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DV CLIENTTRACK USER MANUAL

2015

*A guide to navigating ClientTrack, a web-based case management tool,
from entering basic client information to managing case loads and reports.*

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CLIENTTRACK USER MANUAL

Objectives

Thank you for using ClientTrack for your case management needs. ClientTrack is an electronic data collection system for persons who access a variety of services for homeless prevention and/or rapid re-housing services. Aggregate data can be used to understand the size, characteristics and needs of the population at the local, state and national levels. ClientTrack enables you to track information about client needs, goals and service outcomes.

The content in this user manual will provide information on all of the basic features of ClientTrack and detailed guidance on your day to day data entry, as well as helpful case management tools to optimize your services and time. We believe you will find this web-based case management system easy to use and essential in sharing your impact.

In this manual you will find the following information:

- **Contacts**
 - Staff List and Contact Information
 - DV ClientTrack Help Desk Information
- **Review of Security Policies and Procedures**
 - Computer Storage
 - User Name and Password
- **Overview of ClientTrack Features**
 - User Dashboard
 - Case Management Tools
 - Client Record
 - Household Members
- **Entering Client Information and Managing Program Enrollments**
 - Intake Workflow
 - Services
 - Case Notes
 - Update/Annual Assessment
 - Exit Workflow
 - Providers for Referrals and Services
- **Basic Reports**
 - Service Summary
 - Annual Performance Review (APR)

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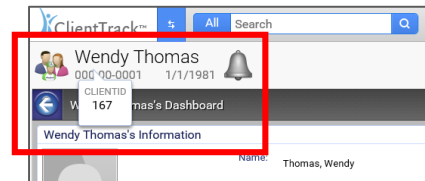
Lynn Morrow

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Indiana Housing and Community Development Authority
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DV CLIENTTRACK HELP DESK

If you encounter any issues with ClientTrack at any time, please contact the help desk with the email address below. **Please do not send any identifying information for clients when emailing the help desk.** There is a unique client ID number assigned to each client record in the system and you can find this number by hovering over the client name at the top of the client record. **Please use the client ID number when emailing the help desk if applicable.**

DV Help Desk: DVHelpDesk@ihcdaonline.com



CLIENTTRACK ACCESS

CLIENTTRACK FOR DOMESTIC VIOLENCE PROVIDERS

[HTTPS://IHCDAONLINE.COM/IDV/](https://ihcdaonline.com/IDV/)

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Security Policies & Procedures

Personal protected information (PPI) is considered any information that could lead to individual identification. Agencies participating in ClientTrack should have procedures in place for the secure storage and disposal of hardcopy and electronic data generated from ClientTrack or created for entry into ClientTrack. PPI should be stored in locked drawers/file cabinets and hardcopy data should be shredded before disposal. Electronic PPI including data contained on disks, CD's, jump drives, computer hard drives and/or other media should be reformatted before disposal.

PRIVACY AND CLIENT INFORMATION RESTRICTIONS

The Domestic Violence ClientTrack environment is a closed system. Client level data is only seen by your organization and the support team.

A client can refuse data collection or data entry into DV ClientTrack, but the client should be asked. The agency cannot determine participation on behalf of the client. ***No person is to be refused services regardless of their participation in ClientTrack.***

You can find Indiana's Balance of State (BOS) security plan on the partner website, as well as other helpful forms and resources: <http://www.in.gov/myihcda/hmis.htm>.

CLIENTTRACK COMPUTERS

All computers used to access ClientTrack should be situated in secure locations. ClientTrack computers in publicly accessible areas should be staffed at all times and not viewable by other individuals. All computers should be password protected and the password you use to log onto your computer should NOT be the same password as your ClientTrack password, but rather a password to prevent access to the computer itself.

ClientTrack usernames and passwords should NOT be shared with other users. Users should not keep username/password information in a public location (i.e., sticky notes on monitors or filed under ClientTrack or Password in a Rolodex). ClientTrack security policies require the use of strict passwords. Passwords must have:

- At least one number
- Between 8 and 12 characters
- At least one non-letter, non-numeric character
- At least one capital letter

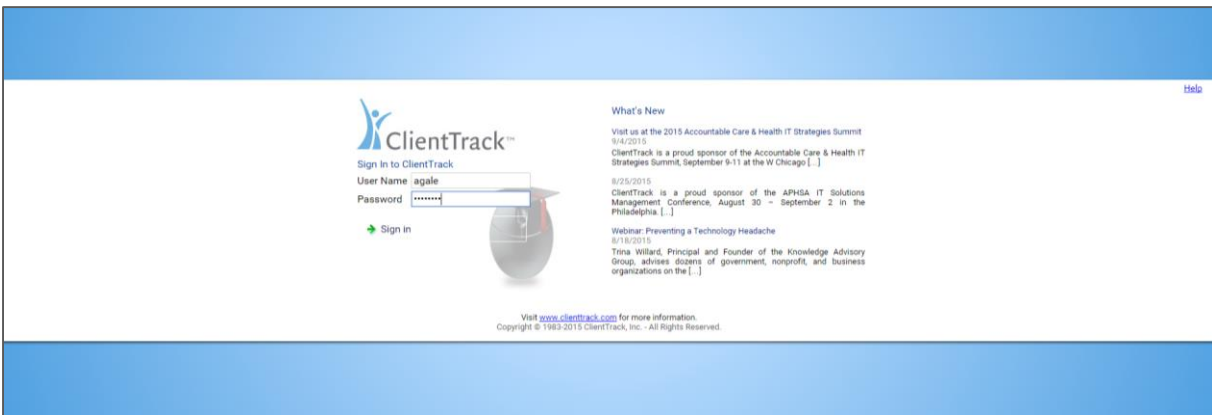
New passwords will be required when you first login. **Accounts are automatically deactivated after 30 days of inactivity for security purposes.** You will be required to change your password every 90 days for security purposes. If you need assistance with your username and password contact the Help Desk by emailing DVHelpDesk@ihcdaonline.com and someone will assist you.

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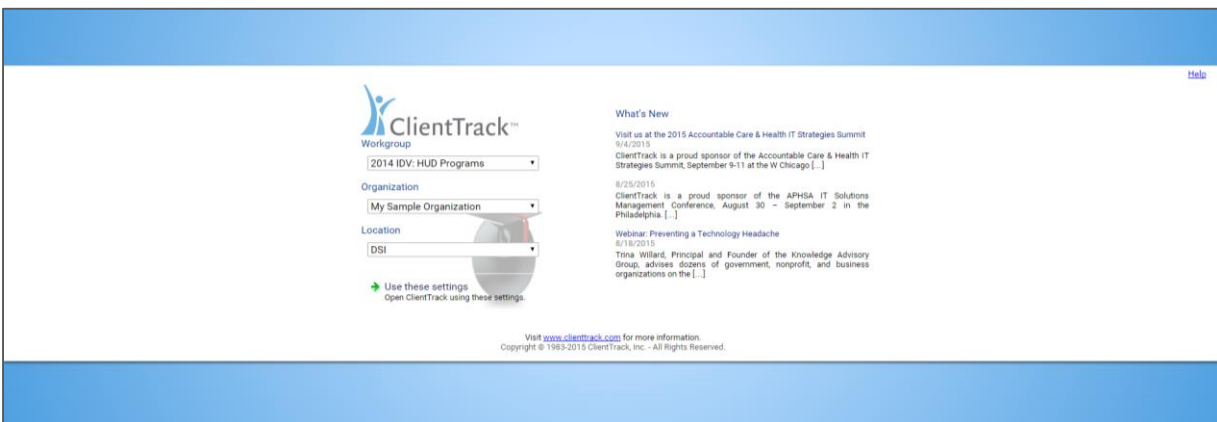
LOGGING INTO THE SYSTEM

ClientTrack is a web-based application and you will need to use an internet browser to access it. ClientTrack works with Microsoft Internet Explorer, Google Chrome, Mobile Safari and Mozilla's Firefox.

Open your web browser and go to <https://ihcdaonline.com/IDV/>. Enter your assigned User Name and Password and click "Sign In." **Remember, sharing your user name and password is NOT permitted. Passwords are case sensitive and pop-up blockers must be turned off to access the application. You may need to change your settings to allow for pop-ups from this site.**

The screenshot shows the ClientTrack login interface. On the left, there is a 'Sign in to ClientTrack' section with fields for 'User Name' (containing 'agale') and 'Password' (masked with dots). Below these fields is a 'Sign in' button. To the right of the login fields is a 'What's New' section with several news items, including a mention of the 2015 Accountable Care & Health IT Strategies Summit. At the bottom of the page, there is a small footer with the text 'Visit www.clienttrack.com for more information. Copyright © 1983-2015 ClientTrack, Inc. - All Rights Reserved.'

Select the workgroup called "2014 IDV: HUD Programs." Also make sure your organization and location is selected appropriately. Click on "Use These Settings" to continue. You will be required to "Accept" the Terms of Agreement when you log into the system for the first time.

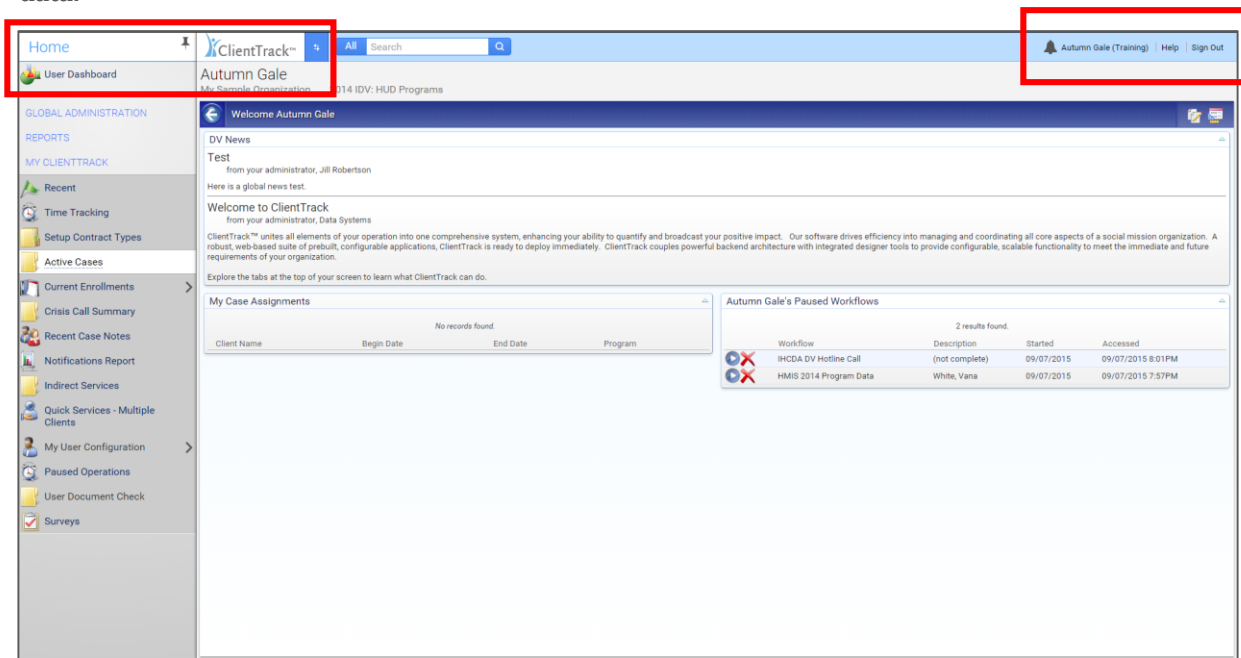
The screenshot shows the ClientTrack settings interface. On the left, there is a 'Workgroup' dropdown menu with '2014 IDV: HUD Programs' selected. Below this are 'Organization' and 'Location' dropdown menus, with 'My Sample Organization' and 'DSI' selected respectively. At the bottom of the settings section is a 'Use these settings' button. To the right of the settings section is a 'What's New' section with several news items, including a mention of the 2015 Accountable Care & Health IT Strategies Summit. At the bottom of the page, there is a small footer with the text 'Visit www.clienttrack.com for more information. Copyright © 1983-2015 ClientTrack, Inc. - All Rights Reserved.'

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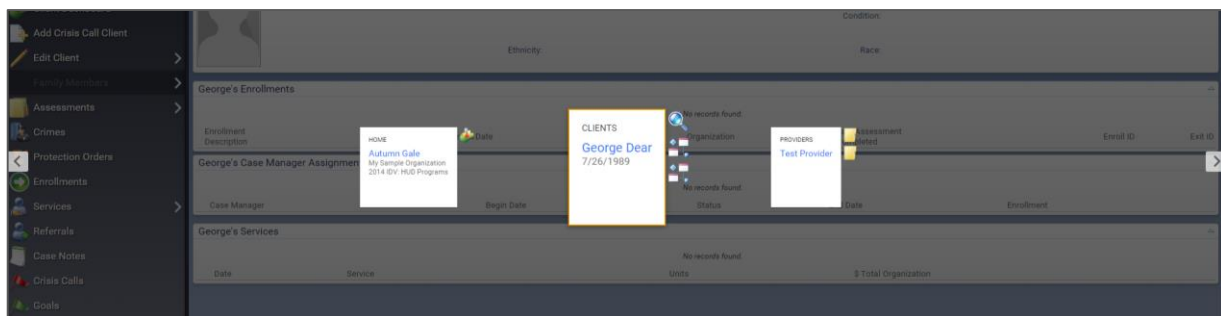
Overview of ClientTrack Features

USER DASHBOARD

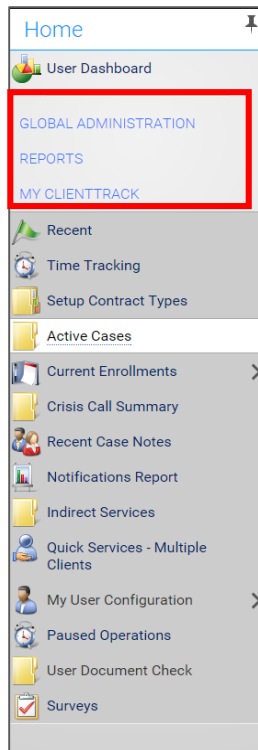
You will be directed to your **User Dashboard** on the “**Home**” screen and notified of any important “**ClientTrack News**” items IHCD wants to communicate (i.e. upcoming trainings, changes etc.) – this is the first screen you come to after logging in. The “**Sign Out**” link is in the upper right-hand corner of the screen. **Please be sure to “Sign Out” any time you need to leave the database to ensure security of client data.**



You can access all three screens, “**Home**,” “**Clients**” and “**Providers**,” which provide you different features for managing your cases by clicking on the link with white arrows to the immediate right of the ClientTrack logo outlined with the red box above. After clicking on the icon, you will see the three boxes appear labeled, “**Home**,” “**Clients**” and “**Providers**” and you can toggle between them by clicking on the appropriate box to take you to that section of ClientTrack as seen below.



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On the “**Home**” screen there is also a list of **Menu Items** that give you easy access to your current case assignments, case notes and more under “**My ClientTrack.**” You can also change your password with the “**Change My Password**” link by clicking on “**My User Configuration**” in the list of Menu Items. All of these tools are designed to maximize your time and grant you easy access to your client records.

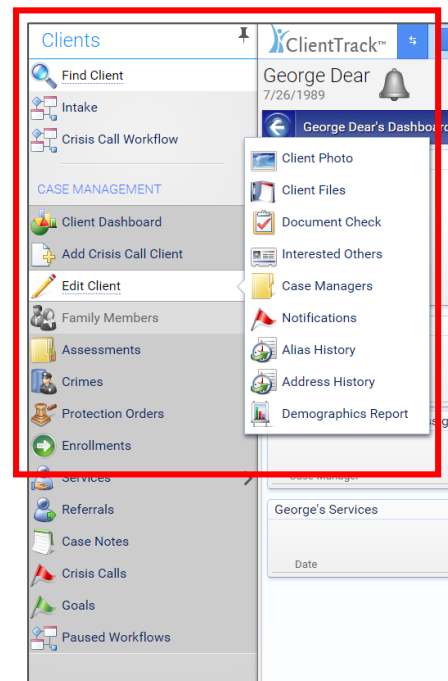
You will also find the “**Reports**” section on the “**Home**” screen. To run a variety of reports, which will be detailed later in this manual, click on “**Reports**” found above “**My ClientTrack**” in the upper left-hand corner of the screen to access reports.

CASE MANAGEMENT TOOLS

On the “**Clients**” screen you will find the most recent client record you were on as well as a list of **Case Management Tools** on the left-hand side of the client record. The following information outlines features and tools found on the client record. To access some of these features you must hover on the link in the case management section and a list of tools will

appear as seen in the red box:

- **Find Client** – To search for a client in the system by first and last name, date of birth, social security number, client ID number, etc.
- **Intake** – To enroll a client in your project.
- **Crisis Call Workflow** – To document a client’s hotline call to your agency.
- **Case Management Tools: (Frequently Used)**
 - **Client Dashboard** – Click on this link to be taken back to the client’s record overview. The overview of the client record is outlined on the next page.
 - **Edit Client** – To edit basic client information like address, date of birth, social security number, disabling condition, veteran status, etc. There are more helpful tools under “Edit Client” that are available for you to use depending on your agency’s needs and requirements.
 - **Family Members** – To review a history of households and household members.
 - **Assessments** – To review assessments - and please note that all required assessments for your project are captured in the Intake Workflow. This is where you can access the **Crimes** and **Protection Orders** assessments to document important information regarding your client’s legal processes or the **Family Development Matrix**. It is necessary to document



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crimes in order to document for the VOCA Report. You can also add judges and prosecutors to your documentation in connection with protective orders.

- **Enrollments** – To view the list of current and past enrollments in which the client has participated.
- **Services** – To add, edit and view the list of services the client has accessed.
- **Referrals** – To create and manage referrals.
- **Case Notes** – To create and review case notes.
- **Crisis Calls** – To review and edit crisis calls for a client.
- **Paused Workflows** – To resume a workflow you previously paused.
- **Basic Client Information and Client ID Number** - Located at the top of the client record and includes the client's name, gender, date of birth, etc. The client ID number is located beside the client name at the very top of the client record (*Client ID Number is required when communicating electronically about a client record, i.e., requesting assistance from the help desk*).

CLIENT RECORD

The client record is broken up into sections with case management tools to help you easily find client information and manage program enrollments, services, case notes, and more.

1. At the very top of the client record, you will see the **client's basic information** and demographics as shown below. You can find the client ID number, which is automatically assigned to the record when created, beside the client's name at the top of the record.

The screenshot displays the ClientTrack interface for a client named Vana White. The interface is organized into several sections, each with a red box highlighting a specific area of interest:

- 1. Basic Client Information and Demographics:** This section at the top of the client record displays the client's name (Vana White), birth date (1/1/1982), and client ID number (000-11-0001). It also includes a profile picture and a list of demographic details: Name (White, Vana), Birth Date (1/1/1982), Age (33), Gender (Female), Disabling Condition (No), Veteran (Yes), Ethnicity (Non-Hispanic/Latino), and Race (White).
- 2. Enrollment Information:** This section displays a table of the client's enrollments. The table has columns for Enrollment Description, Case Members, Enroll Date, Exit Date, Organization, Last Assessment Completed, Enroll ID, and Exit ID. The first enrollment is for Transitional Housing, starting on 12/01/2014 and ending on 08/09/2015, with a last assessment completed on 01/08/2016.
- 3. Case Assignments:** This section displays a table of the client's case manager assignments. The table has columns for Case Manager, Begin Date, Status, End Date, and Enrollment. The first assignment is for Autumn Gale, starting on 12/01/2014 and ending on 01/05/2015, with a status of Inactive.
- 4. Services:** This section displays a table of the client's services. The table has columns for Date, Service, Units, and \$ Total Organization. The first service is for August, 2015 (1 Services), starting on 08/09/2015, with a service of Case Management, 1.00 units, and a total of \$0.00.

2. In the center of the client record, you will see all of the client's past and present **program enrollments** as seen above.

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There is a blue play button or action wheel you can click on to easily manage your program enrollment. When you click on the blue play button, a drop down list will appear where you can:

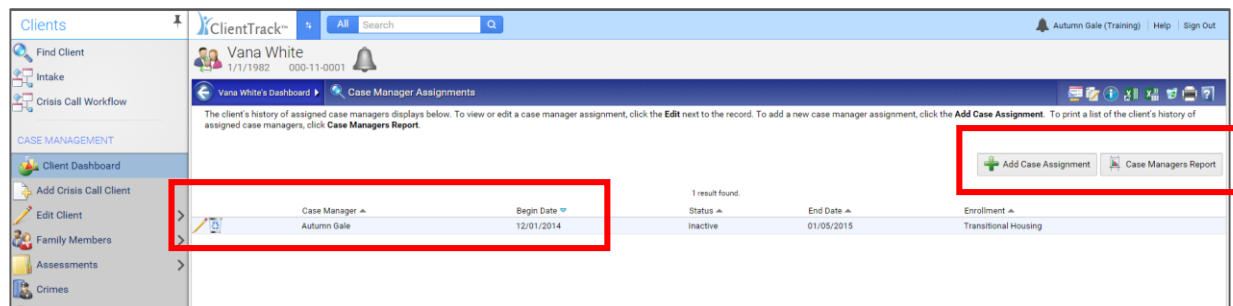
- **Edit Enrollment** – Edit the enrollment date with this feature.
- **Re-enter the Enrollment** – Use this feature to re-enroll a client who was prematurely discharged or his/her enrollment status changed to continue services.
- **Add Family Member** – Use this feature if a new household member needs to be enrolled after an enrollment has already been established, i.e., a new baby is born and needs to be enrolled with Mom. Make sure you're on the head of household's client record when adding a family member to the enrollment. This workflow will step you through adding the household member and enrolling him/her at the same time.
- **View Case Members** – View all case members associated with the specific project enrollment.
- **Review Entry/Exit Assessments** – You can review the assessments completed at entry and exit with this feature. This is helpful in completing missing data that was not captured at those points in time.



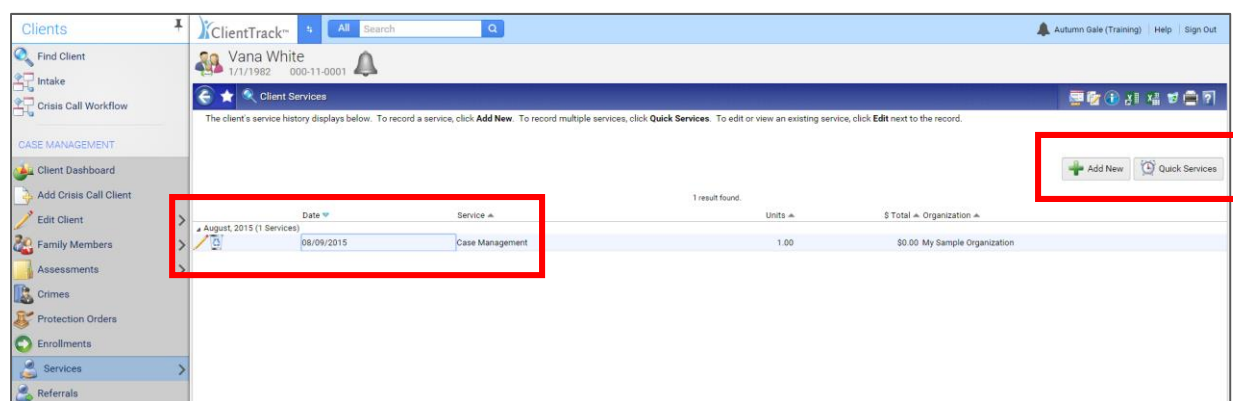
- **Update/Annual Assessment** – Use the Update/Annual Assessment to conduct annual assessments or capture changes to a client's status since enrollment.
- **Exit the Enrollment** – To exit a client, select "Exit the Enrollment" and you will be prompted through the exit workflow for the client and all household members if applicable. If you need to only exit one household member, go to the specific household member's client record and conduct the exit workflow and be sure to not select "Exit All Case Members."

3. Case Manager Assignments are located below the enrollments section of the client record. You can manage case manager assignments here by clicking on the **"Vana's Case Manager Assignments"** link or clicking on the little notepad beside the case manager's name listed. By clicking on the case manager assignments link, you will be taken to a screen where you can edit the status of a case manager for a specific program enrollment or add new case managers to the client record (outlined on the next page). Clicking on the **recycle bin** beside a case manager's name will delete the case manager from the client record.

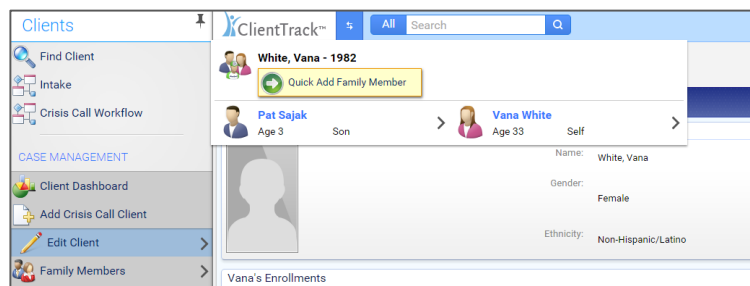
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4. **Services** associated with a specific program enrollment will be listed at the bottom of the client record. You can manage your client services by clicking on **“Services”** in the list of case management tools on the left-hand side of the client record or by clicking **“Vana’s Services”** above the list of services on the client record. Documenting services is discussed in detail on pages 32 and 33 of this manual.



HOUSEHOLD MEMBERS



You can view household members and their client records by clicking on the **multi-colored family icon** at the top of the client record beside the client name. A window will appear with all of the current household members. You can click on the names of the household members in the window to

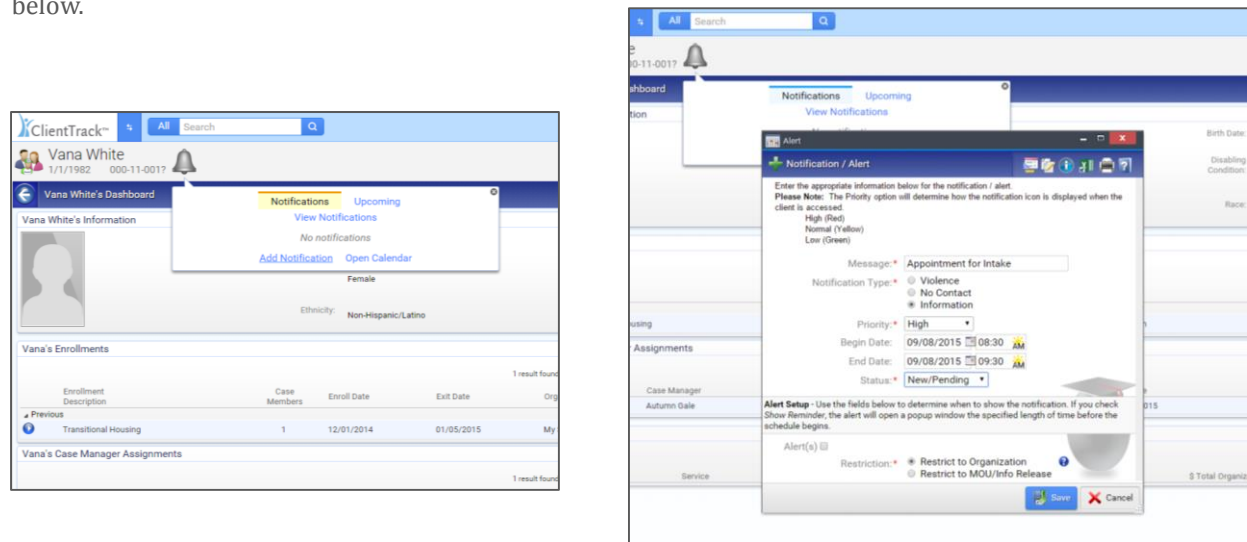
go directly to his/her client record. You can also use the **“Quick Add Family Member”** link in this drop down to add new household members. **Please note that you will be able to add household members during an Intake workflow as well.** You may also add a family member to an existing enrollment with the **“Add Family Member”** feature (described on page 8) listed when you click on the blue play button beside your program enrollment. This will prompt you through the new household member’s information as well

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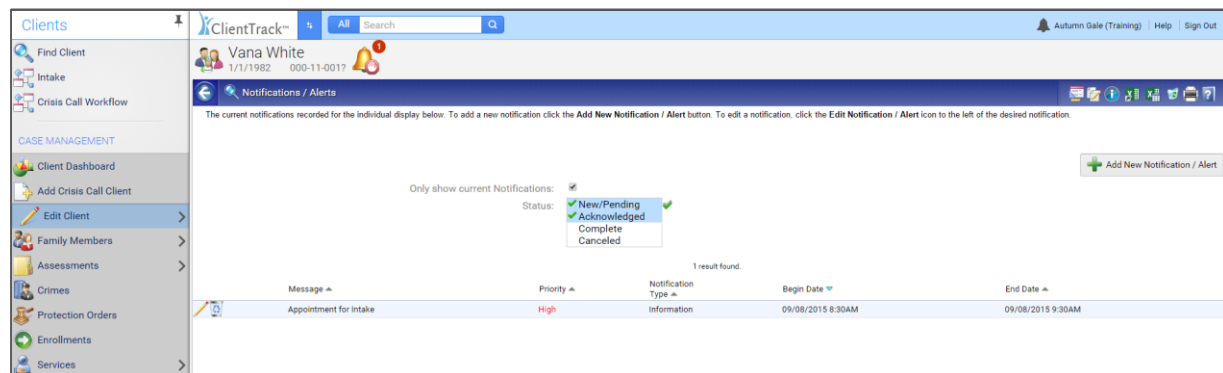
as the intake workflow to include the new household member in the enrollment. Be sure to change the date to reflect the actual date of enrollment.

NOTIFICATIONS

ClientTrack features a **“Notifications”** tool on the client record that allows you to set up notifications specific to the client, like reoccurring appointments, required documentation, client deadlines, etc. The Notifications tool looks like a bell and is located beside the multi-colored family icon at the top of the client record. To add a new notification, click on the bell and a new window will appear below it. Select **“Add New”** to add a new notification. A new window will open where you can set up the new notification as seen below.



After setting up the notification with your specifications, you can review your notifications and calendar by clicking on the bell and selecting **“View Notifications”** as seen below. You can also see that the bell changed in color to show that a notification has been set up for this client record.

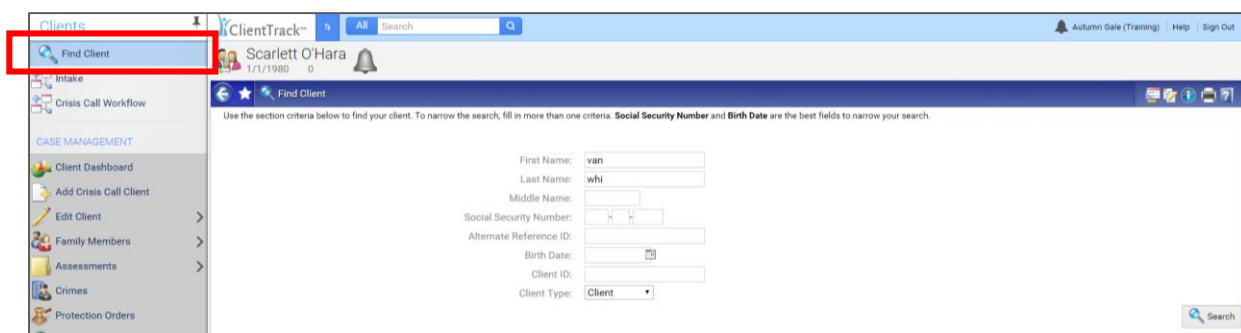


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Entering Client Information and Managing Program Enrollments

FINDING A CLIENT IN THE SYSTEM

Before entering a client into the system as a new client, you should always conduct a search for the client to see if there is an existing client record in the system. To search for a client, click on “**Find Client**” in the upper left-hand corner of the screen as outlined in red below.



The screenshot shows the ClientTrack web application. On the left sidebar, under the 'Clients' section, the 'Find Client' link is highlighted with a red rectangular box. The main content area displays the 'Find Client' search form. At the top of the form, it says 'Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. Social Security Number and Birth Date are the best fields to narrow your search.' The form contains the following fields: First Name (van), Last Name (whi), Middle Name, Social Security Number, Alternate Reference ID, Birth Date, Client ID, and Client Type (Client). A 'Search' button is located at the bottom right of the form.

It is imperative you do not enter a duplicate client record into the system in order to ensure the accuracy and overall quality of the data. To speed the search process and reduce the chance for input error, input as few characters as possible in the criteria fields. You may search for a client by entering any of the following:

- Letters of the client first/last name (try only entering the first few letters of the name to conduct a thorough search)
- Social Security Number
- Birth Date
- Client ID Number

It is important to try different options for your search. **Again, it is best to ONLY enter the first few letters of the first and last name and not rely solely on a social security number or birth date, as those elements have a higher rate of missing or inaccurate data.** Another option for searching is to search different spellings of the client's name and remember to search for nicknames such as “Joe” in addition to “Joseph” or “Jen” in addition to “Jennifer.”

IHCDA works to eliminate duplicate clients in ClientTrack. Please contact the DV Help Desk at DVHelpdesk@ihcdaonline.com with clients who have multiple records in the system. When sending a notification of duplicates or any information regarding clients to the Help Desk, please ONLY send Client ID numbers. Client ID numbers are found by hovering over the client name at the top of the client dashboard.

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If the client is already in the system, highlight the client name in the search results and click on the **Client Name** to select that record. The selected client's information will be displayed at the top of the screen and all information entered from this point forward while on the **Clients screen** will be associated with the currently selected client.

The screenshot shows the 'Find Client' search results page in ClientTrack. The left sidebar contains navigation options: Find Client, Intake, Crisis Call Workflow, and a 'CASE MANAGEMENT' section with Client Dashboard, Add Crisis Call Client, Edit Client, Family Members, Assessments, Crimes, Protection Orders, Enrollments, Services, Referrals, Case Notes, Crisis Calls, Goals, and Paused Workflows. The main area displays search criteria: First Name (van), Last Name (whi), Middle Name, Social Security Number, Alternate Reference ID, Birth Date, Client ID, and Client Type (Client). Below the criteria, a table shows 1 result found for 'Vana White' with SSN 'XXX-XX-0017' and Birth Date '01/01/1982'. The 'Edit Client' option in the sidebar is highlighted with a red box.

If the client's basic information has changed, you should click on the **"Edit Client"** case management tool found on the left-hand side of the client record outlined in red below to make any necessary changes to the client demographic information (i.e., birth date, ethnicity, name change, etc). *****Please note that the "Save" button will save the changes you made to the screen and take you to the Client Dashboard.***

The screenshot shows the 'Edit Client' form in ClientTrack. The left sidebar is the same as the previous screenshot, with 'Edit Client' highlighted in red. The main area displays the 'Client Information' section for 'Vana White' (SSN: 000-11-0001). The 'BASIC CLIENT INFORMATION' section includes fields for First Name (Vana), Last Name (White), Middle Name, Suffix, Name Quality (Full name reported), Social Security Number (000-11-0001), and Alternate Reference ID. The 'Basic Client Demographics' section includes Birth Date (01/01/1982), Client Age (33), Date of Birth Quality (Full DOB Reported), Ethnicity (Non-Hispanic/Latino), Race (American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, White, Client doesn't know), Gender (Female), Pregnancy Status (No), Disabling Condition (No), and Veteran Status (Yes). The 'Save' button is highlighted with a red box.

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ADDING A NEW CLIENT WITH CRISIS CALL WORKFLOW

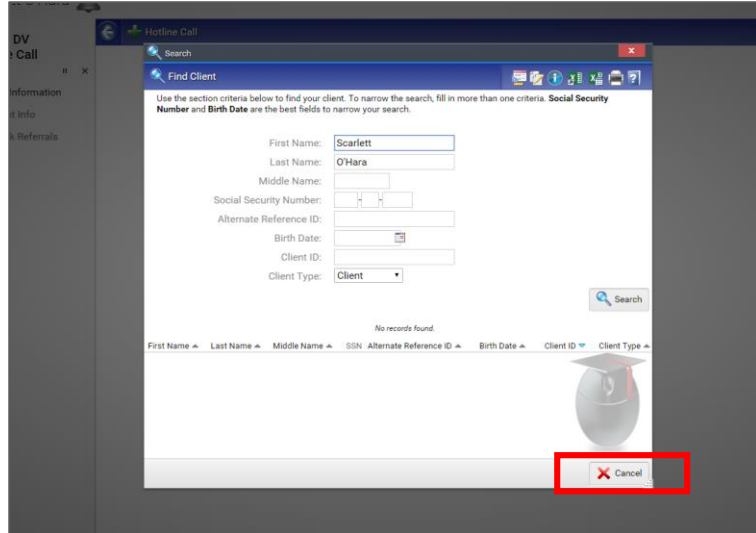
ClientTrack utilizes a specific workflow to step you through the process of completing all required data elements. Be sure to first conduct a search for your client with the **“Find Client”** tool and if your client cannot be found in the system, click on **“Crisis Call Workflow”** on the **“Clients”** screen to document a crisis call and add a new client. ***Please note that crisis calls can also be documented as a service in the service section of ClientTrack.***

The Crisis Call Workflow will be prompted and you will be taken to the first screen where you document the time of the call, the caller and all other important information. Some fields may require additional information and those fields will populate if required. Please note that all fields with an **asterisk *** are required data elements and must be completed before moving to the next section of the workflow process. Click **“Save”** when finished.

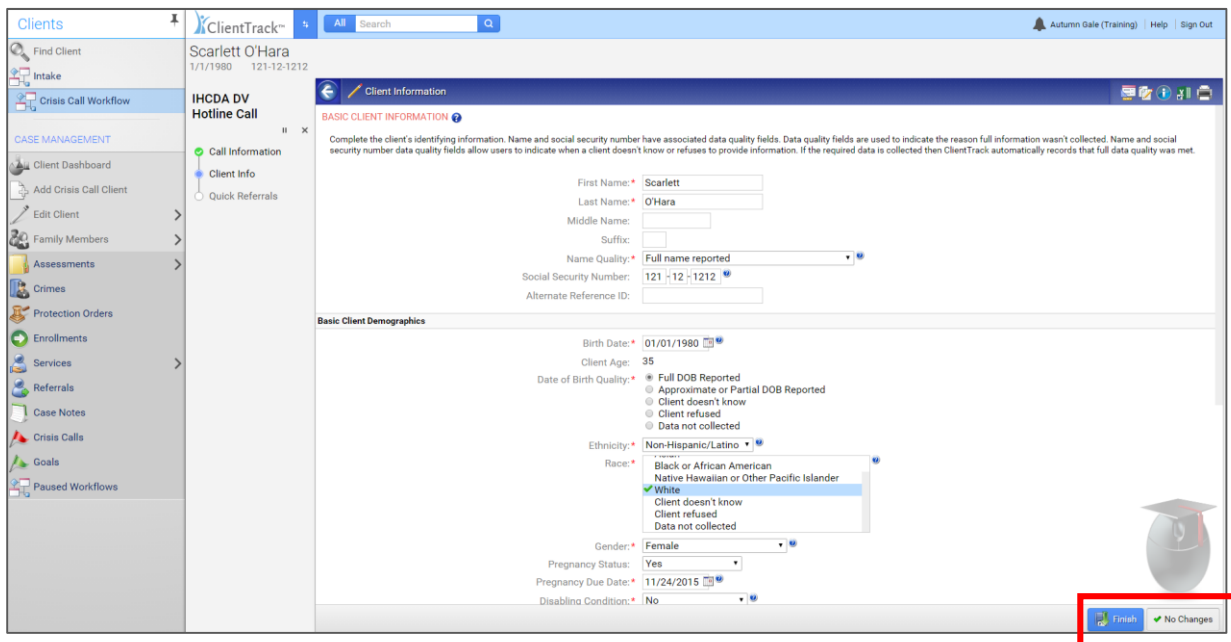
The screenshot displays the ClientTrack interface for the 'Crisis Call Workflow'. The left sidebar shows the 'Crisis Call Workflow' option highlighted with a red box. The main content area is titled 'IHCDA DV Hotline Call' and contains a form for documenting a crisis call. The form includes fields for Date and Time (09/09/2015 07:32), Contact Type (Hotline Call), Call Type (Caller is Victim), and a Description field. It also has dropdown menus for 911 Needed (No), Caller Last Name (O'Hara), Caller First Name (Scarlett), Are you safe? (Yes), Are you injured? (No), Is Abuser Present? (No), Victimization Type (Domestic Violence), and Shelter Needed? (Yes). At the bottom, there are fields for #Adults (1) and #Children (1), and a Restriction section with radio buttons for 'Restrict to Organization' and 'Restrict to MOU/Info Release'. A 'Save' button is located at the bottom right of the form.

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When entering the caller's name, the system will conduct a search in the database to double-check whether a client record already exists for the caller. If the client appears in the search list, please click on the client's name to select that client record. If the client does not appear in the search list, click **"Cancel"** and continue entering the caller's information.



Review or enter the caller's basic client information and complete all fields with an **asterisk ***. Click **"Finish"** when completed.



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The next section of the Crisis Call Workflow allows you to document any referrals made. Complete the information and you can add as many referrals as necessary by clicking on the plus sign (+) button above the **“Referral Status.”** You can set up a database of providers to attach to referrals, crimes, protection orders under the **“Providers”** screen. Providers are covered in more detail on page 52. Click **“Save & Close”** when finished or **“Skip”** if no referrals are made at that time.

ClientTrack - Scarlett O'Hara (1/1/1980)

Quick Referrals

Use this form to identify multiple referrals for a client, quickly. Change the Referral Screen to filter pre-defined referrals available. To add additional referrals that are not listed, add new rows to the bottom of the form. Choose a service that the client needs and the list of providers will show all providers that provide that service.

Referral Date: 09/14/2015

Referring Provider Name: DSI

Referring Location: Autumn Gale

Referring User: Autumn Gale

Referral Screen: Preferred Providers

Referral Status	Service	Provider Name	Telephone	Street	City	State	Zip Code	Restriction
Referral Made	Legal Counseling	ABC Legal Counsel						Restrict to Organization
-SELECT-	-SELECT-							-SELECT-

Save Save & Close Skip

This completes the Crisis Call Workflow and you will be prompted to **“Finish”** the workflow to close it and document the call under **“Crisis Calls”** in the list of case management tools on the client’s record.

ClientTrack - Scarlett O'Hara (1/1/1980)

Finish

You're done!
All required steps have been completed.

Finish
Close the workflow

CLIENTTRACK USER MANUAL

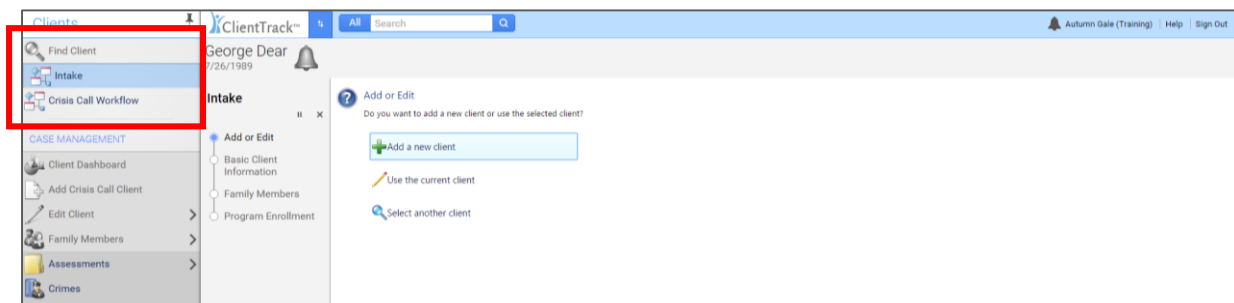
You can manage and review a client's crisis calls by clicking on **"Crisis Calls"** in the list of case management tools to the left of the client record. To review or edit a call, click on the little notepad beside the specific call. You can remove crisis calls by clicking on the recycle bin beside the call. Please note this will delete the call from the client's record.



ADDING A NEW CLIENT WITH PROGRAM ENROLLMENT

ClientTrack utilizes a specific workflow to step you through the process of completing all required assessments at entry and discharge. The workflow is easy to use and it automatically prompts you for the necessary information.

After conducting a search for the client in the system to ensure an existing client record does not already exist, you can add a new client record by selecting **"Intake"** in the upper left-hand corner of the screen found under **"Find Client"** (outlined in red below). Then choose **"Add New Client"** when prompted as seen below.



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Enter your client's first and last name and click **"Next."** If a duplicate client already exists and was not identified during the client lookup, **a warning in red letters** will be displayed. It is very important to review the displayed list. If the client is already in the system, click the client's name to select the existing client record. If the client you are entering is a new client, do not select a client in the displayed list, click **"Next"** to proceed with the intake process.

ClientTrack - Vana Whit

Intake

Basic Client Information

Search Existing Clients

Please address the following:
Please review the list below for potential duplicates. Click Next if this is not a duplicate.

SEARCH EXISTING CLIENTS

The first step in adding a new client is to search existing client records for possible matches to avoid duplicate entry. Enter partial identifying information on the client, and then click Next to search from existing client records.

- If the system finds no potential matches, you will be taken directly to Step 2.
- If the system finds potential matches, the search results will display below. If an accurate match appears, select and open that existing client record by clicking on that row.
- If there are no accurate matches, click Next again to continue to Step 2 in adding a new client record.

First Name: Vana
Last Name: Whit
Social Security Number: 000-11-0017
Birth Date: 01/01/1982

1 result found.

First Name	Last Name	Social Security Number	Birth Date
Vana	White	000-11-0017	01/01/1982

Add the client's basic information including date of birth, social security number, demographics, disabling condition, Veteran status and address. Click **"Finish"** when the client's basic information is complete.

Please note that all of the data elements are self-declared by the client and not attributed by the case manager or data entry personnel. The option "Data Not Collected" indicates that the question was not asked of the client and will report as missing on reports. Please do not make up information or answer for the client.

ClientTrack - Vana White

Intake

Basic Client Information

1/1/1982 000-11-0017

Basic Client Information

Complete the client's identifying information. Name and social security number have associated data quality fields. Data quality fields are used to indicate the reason full information wasn't collected. Name and social security number data quality fields allow users to indicate when a client doesn't know or refuses to provide information. If the required data is collected then ClientTrack automatically records that full data quality was met.

First Name: Vana
Last Name: White
Middle Name:
Suffix:
Name Quality: Full name reported
Social Security Number: 000-11-0017
Alternate Reference ID:

Basic Client Demographics

Birth Date: 01/01/1982
Client Age: 33
Date of Birth Quality: Full DOB Reported
Ethnicity: Non-Hispanic/Latino
Race: White
Gender: Female
Pregnancy Status: No
Disabling Condition: No
Veteran Status: Yes

Finish No Changes

CLIENTTRACK USER MANUAL

Definitions of Basic Client Information Requirements

- **First Name** - Legal first name (do not add nicknames in “quotes” because those are not searchable elements. Add this information to the alias field.)
- **Last Name** – Legal last name
- **Social Security Number (SSN)** – If the client doesn’t know or refuses to provide their SSN, DO NOT under any circumstance, enter a fake social security number such as 123-45-6789 or 999-99-9999. Select the data quality option that best reflects the client’s response.
- **Birth Date** – Month, day and year the client was born. Again, do not make up a birth date. Choose the appropriate data quality option that best reflects the client’s response.
- **Ethnicity** – Hispanic/Latino origin includes individuals of Cuban, Mexican, Puerto Rican, South or Central American origin.
- **Race** – A person can identify with multiple races and this is a multi-select box that allows for multiple races to be checked at once.
- **Gender** – Select gender with which the client identifies.
- **Disabling Condition** – Select the appropriate response as reported by the client.
- **Veteran Status** – Select the appropriate response as reported by the client. If you select “Yes” for Veteran Status here, you will be prompted in the workflow to complete the Veterans Assessment.
- **Family** – Do NOT enter anything in the “Family” field. ClientTrack will create a household/family account.
- **Relationship to Head of Household** – When entering the first client in the household, the system will default to “Self.” It is imperative this information is entered correctly for ALL household members. Otherwise, your reports will not accurately reflect the clients and household make-up.
- **Address** – Add the address where the client currently resides (emergency shelter, etc.). If the client enters emergency shelter, you should use their previous address.

Adding Household Members

Next you will add any additional household members to include for the program enrollment or services. To add household members, click on the empty box and complete the row of information (name, birth date, etc.) for the new household member. You can tab through the fields to complete the required information, and you can add any number of household members at this time by repeating these steps.

First Name	Middle Name	Last Name	Name Quality	Gender	Other Gender, please specify	Birth Date	Age	Birth Date Quality
Vana		White	Full name reported	Female		01/01/1982	33	Full DOB Reported
Pat		Sajak	Full name reported	Male		12/01/2011	9	Full DOB Reported
			-- SELECT --	-- SELECT --			N/A	-- SELECT --

CLIENTTRACK USER MANUAL

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. **Social Security Number and Birth Date** are the best fields to narrow your search.

First Name:

Last Name:

Middle Name:

Social Security Number:

Alternate Reference ID:

Birth Date:

Client ID:

Client Type:

Search

No records found

First Name Last Name Middle Name SSN Alternate Reference ID Birth Date Client ID Client Type

Cancel

The system will automatically conduct a search for the new household member after you enter the first and last name. If the new household member is already in the system, click on the appropriate name in the search list that appears in the new window to attach the existing client record to the household. If the household member is a new client, click on **"Cancel"** in the search window and proceed entering the new household's information in the required data fields. Click **"Save & Close"** when finished adding household members.

Program Enrollment

Programs vary in their data requirements and ClientTrack will prompt you through the workflow to collect all of the required HUD data elements for your specific program. Please note that all fields with an **asterisk *** are required data fields and you will not be able to proceed in the workflow until all of the required information is completed.

ClientTrack

Vana White

1/1/1982 000-11-0017

HUD Program Enrollment

Select the **Program** you are enrolling the client into. ClientTrack will display a list of clients in the client's family. Please select all the clients you are enrolling.

Program:

Household - Excerpt from the HMIS Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."

Name	Gender	Age	Project Entry Date	Case Manager	Relationship to Head of Household
White, Vana	Female	33	09/07/2015	Autumn Gale	Self
Sajak, Pat	Male	3	09/07/2015	Autumn Gale	Son

Restriction: Restrict to Organization Restrict to MOU/Info Release

Save

Select your **"Program"** with the drop down box and then select which household members to enroll by clicking on the box beside the client name. If a check mark appears by a client name on the program

CLIENTTRACK USER MANUAL

enrollment screen (as seen below), the client will be enrolled in your program. You can de-select a client by clicking on the check mark beside his/her name to remove the check mark and ensure the client is not enrolled.

Remember to change the Enrollment Date if you are back dating the information. To ensure accurate data quality, enter all client data in a timely manner.

If you do not find your program option when enrolling a client, cancel the workflow by clicking the black "X" in the workflow screen found in the upper left-hand corner and please notify IHCDa immediately at DVHelpDesk@ihcdaonline.com. Program information must be set up in the system before you can begin to enroll clients.

Universal Data Assessment

Complete all the required data fields indicated by an **asterisk *** and click **"Save"** to continue.

The screenshot shows the ClientTrack interface with the 'Universal Data Assessment' form for client Vana White. The form includes sections for Assessment Date, Age, Assessment Type, Assessor, Program, Housing Status, Client Location, Prior Residence, Length of Time on Street, Homeless Status, and Health Insurance. A table at the bottom lists existing insurance sources, with 'Medicaid' currently active. The 'Save' button is highlighted with a red box.

Type	Is Primary Status	Reason No	Start Date	End Date	Restriction
Medicaid	Active		01/01/2011		Restrict to Organization
- SELECT -	- SELECT -				- SELECT -

CLIENTTRACK USER MANUAL

Definitions of Universal Data Requirements

- **Assessment Date** – Date the assessment was completed with the client (field will auto-fill with today's date).
- **In Permanent Housing** – Select “Yes” or “No” if the client is in permanent housing. This question is only asked for CoC, ESG, and SSVF Rapid Re-Housing clients.
- **Housing Status** – Choose the appropriate category for the housing status of the household. This is based on the household's housing condition just prior to project entry. More extensive definitions can be found by clicking on the blue information circle located in the upper right-hand of the screen beside the printer icon.
- **Residence Prior to Program Entry** – Identify where the client was staying on **the night before** the client is enrolled in your program.
- **Length of Stay** – Identify the length of stay for the residence prior to program entry.
- **Time on Streets, Emergency Shelter, or Safe Haven** – Data in this section are used along with disabling condition to determine whether or not a client is chronically homeless. *HUD strongly encourages HMIS users to just ask the client for the information and record the client's answer. Attempting to tie each individual response with definitions or documentation requirement is not the attempt of this question.*
- **Health Insurance Assessment** – Complete the required information pertaining to the client's insurance status.

Barriers Assessment

To select a barrier, click on the drop down box for “**Barrier Present**” and change the status to “**Yes.**” The system defaults “**No**” for all barriers. Complete any required fields that appear after selecting that specific barrier. Please note that the date identified is the program enrollment date – the date the client presents to you and qualifies for enrollment. It is important to keep in mind that clients must have at least one barrier

The screenshot shows the ClientTrack interface for a client named Vana White. The left sidebar contains navigation links for Intake, Crisis Call Workflow, Case Management, Family Members, Assessments, Crises, Protection Orders, Enrollment, Services, Referrals, Case Notes, Goals, and Paused Workflows. The main content area is titled 'Barriers' and includes a 'Universal Data Assessment' header. Below this, there is a table for assessing various barriers. The table has columns for Barrier, Help, Barrier Present (a dropdown menu), Receiving Services / Treatment, Condition is Indefinite, Documentation of the disability and severity on file, Explanation, and Previous Barrier Details. The barriers listed are Alcohol Abuse, Chronic Health Condition, Developmental Disability, Drug Abuse, HIV/AIDS, Mental Health, and Physical Disability. All 'Barrier Present' dropdowns are currently set to 'No'. The 'Identified Date' is 09/07/2015. A 'View Barrier History' button is located in the top right corner of the table area.

Barrier	Help	Barrier Present	Receiving Services / Treatment	Condition is Indefinite	Documentation of the disability and severity on file	Explanation	Previous Barrier Details
Alcohol Abuse	?	No					Previous Barrier
Chronic Health Condition	?	No					Previous Barrier
Developmental Disability	?	No					Previous Barrier
Drug Abuse	?	No					Previous Barrier
HIV/AIDS	?	No					Previous Barrier
Mental Health	?	No					Previous Barrier
Physical Disability	?	No					Previous Barrier

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to be eligible for some programs (such as Permanent Supportive Housing). If **no barriers** are present at enrollment, select all barriers and leave the **“Barrier Present”** status as **“No”** and click **“Save & Close.”**

Domestic Violence Assessment

Complete the required information for the Domestic Violence Assessment. Please note that if domestic violence is reported and you select **“Yes”** for **“Domestic Violence Experience,”** you will be prompted for more information. Click **“Next”** to proceed in the workflow.

The screenshot shows the ClientTrack interface for a Domestic Violence Assessment. The left sidebar contains navigation options like 'Find Client', 'Intake', 'Crisis Call Workflow', and 'CASE MANAGEMENT'. The main area displays the assessment form for 'Vana White' (DOB 1/1/1982). The form is titled 'DOMESTIC VIOLENCE ASSESSMENT OF VICTIM' and includes sections for 'Victim Information', 'Domestic Violence', 'Sexual Assault', and 'Survivor History'. The 'Victim Information' section contains fields for 'Assessment Date' (09/07/2015), 'Is client a victim of domestic violence?' (Yes), 'When Exp Occurred' (Within the past three months), 'Victimization Date' (09/07/2015), 'Victimization Type' (Primary Victimization), 'Age at Time of Incident' (33), 'Interviewer' (Autumn Gale), and 'Assessment Description' (Initial Intake). The 'Domestic Violence' section includes 'Interview Type' (In-Person), 'Physical' (checked), 'Sexual' (unchecked), 'Psychological' (unchecked), 'Stalking' (unchecked), 'Human Trafficking' (unchecked), 'Weapon Used' (SELECT), 'Associated with DV - Alcohol' (Yes, By Abuser), 'Associated with DV - Drugs' (Yes, By Abuser), and 'Length of Violent Relationship' (Under 1 Year). The 'Sexual Assault' section has dropdowns for 'Sexual Assault Type', 'Sexual Assault Location', and 'Length Before Contact'. The 'Survivor History' section includes 'Survivor of Incest' (unchecked) and 'Other Child Sexual Abuse' (checked). A red box highlights the 'Next' button at the bottom right.

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Domestic Violence Assessment Continued

Complete the requested information, noting that all fields with an **asterisk *** are required data elements. Click **“Next”** to proceed in the workflow.

ClientTrack interface showing the Domestic Violence Assessment of Victim screen. The screen displays the client's information (Vana White, 1/1/1982) and the assessment progress. The active tab is Domestic Violence Assessment of Victim, which includes sections for Other Information and Offender's Relationship to Victim. The Other Information section includes checkboxes for Child Abuse, Physical Abuse, Psychological Abuse, Child Witnessed Abuse, Abuse through Neglect, and a dropdown for Other Type of Abuse (Harassment). The Offender's Relationship to Victim section includes a dropdown for Relationship to Victim (Intimate Partner). The bottom right corner of the screen features a red box containing 'Previous' and 'Next' buttons.

You will come to the last screen in the DV Assessment. Click **“Finish”** to complete the DV Assessment as seen below.

ClientTrack interface showing the Legal / Crime Information screen. The screen displays the client's information (Vana White, 1/1/1982) and the assessment progress. The active tab is Legal / Crime Information, which includes sections for Legal Information and Legal / Resolution. The Legal Information section includes dropdowns for Law Enforcement Called, Abuser Arrested, Incident Report Filed, and Signer of Report. The Legal / Resolution section includes checkboxes for Criminal Complaint Filed, Went to Court, Convicted, Civil Resolution, No Legal Resolution, and Restriction (Restrict to Organization, Restrict to MOU/Info Release). The bottom right corner of the screen features a red box containing 'Previous' and 'Finish' buttons.

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Financial Assessment

Complete the status for **“Income from Any Source”** and **“Non-Cash Benefits from Any Source”** with the provided drop down lists. If the status for either of these financial sources is **“Yes,”** you will be prompted to provide more information on the **“Type”** (definitions on below) of income/benefit and the **amount (enter monthly amount)** with the list that appears below the status after selecting **“Yes.”** Please note that Non-Cash Benefits will appear below Income and you will need to scroll down to input that information.

Also input any income a child may receive (i.e., SSDI) on the head of household’s income/benefits information. You will not complete a Financial Assessment for children in the household.

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Universal Data Assessment ▶ Domestic Violence Assessment of Victim ▶ Income and Sources, Non-Cash Benefits

Indicate below the client's sources of **monthly** income, non-cash benefits and expenses.

The following instructions are quoted from the HMIS Data Manual:

- When a client has income, but does not know the exact amount, a "Yes" response should be recorded for both the overall income question and the specific source, and the income amount should be estimated.
- Income received by or on behalf of a minor child should be recorded as part of household income under the Head of Household, unless the federal funder in the HMIS Program Specific Manual instructs otherwise. Income should be recorded at the client level for heads of household and adult household members. Projects may choose to collect this information for all household members including minor children, as long as this does not interfere with accurate reporting per funder requirements. Projects collecting data through client interviews should ask clients whether they receive income from each of the sources listed rather than asking them to state the sources of income they receive.
- Income data should be recorded only for sources of income that are current as of the information date (i.e. have not been specifically terminated). As an example, if a client's employment has been terminated and the client has not yet secured additional employment, the response for Earned income would be "No." As a further example, if a client's most recent paycheck was 2 weeks ago from a job in which the client was working full time for \$15.00/hour, but the client is currently working 20 hours per week for \$12.00 an hour, record the income from the job the client has at the time data are collected (i.e. 20 hours at \$12.00 an hour).

Assessment Date: 09/07/2015

Income from Any Source: Yes

Non-Cash Benefits from Any Source: Yes

Type	Description	Monthly Amount	Restriction
<input checked="" type="checkbox"/> Earned Income (i.e., employment income)	Part-time employment	\$800.00	Restrict to Organization
<input type="checkbox"/> Unemployment Insurance			Restrict to Organization
<input type="checkbox"/> Supplemental Security Income (SSI)			Restrict to Organization
<input type="checkbox"/> Social Security Disability Income (SSDI)			Restrict to Organization
<input type="checkbox"/> Veteran's Disability Payment			Restrict to Organization
<input type="checkbox"/> Private Disability Insurance			Restrict to Organization
<input type="checkbox"/> Worker's Compensation			Restrict to Organization
<input type="checkbox"/> Temporary Assistance for Needy Families (TANF)			Restrict to Organization
Count/Total Monthly Income		1	\$800.00

Save and Close

Definitions of Sources of Income

- **Earned Income** – Employment income
- **Private Disability Insurance** – Income received from private disability insurance
- **Unemployment Insurance** – Unemployment benefits from the State
- **Worker's Compensation** – Income for an individual who has been injured on the job
- **Pension From Former Job** – Income from a private employer or military retirement pay
- **Supplemental Security Income** – A federal program providing additional income for older and disabled individuals with little to no income stream
- **Social Security Disability Income** – A monthly compensation to individuals who can no longer work due to their medical conditions
- **Retirement (Social Security)** – Income payment provided by government for individuals who qualify
- **Alimony** – Income received for spousal/partner support

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Definitions of Sources of Income Continued

- **VA Service-Connected Disability** – A benefit paid to a veteran because of injuries or diseases that happened while on active duty or were made worse by active duty
- **VA NonService-Connected Disability** - To assist wartime veterans in need whose non-service-connected disabilities are permanent and total preventing them from following a substantially gainful occupation.
- **TANF** –Temporary Assistance for Needy Families
- **Child Support** – Income received from one parent to another to care for children
- **Other Income** – Any income not previously listed

The screenshot shows the ClientTrack application interface. On the left is a sidebar with navigation links. The main window displays the 'Income and Sources, Non-Cash Benefits' section for a client named Vana White. It features a table with columns for 'Type', 'Description', 'Monthly Amount', and 'Restriction'. The table lists various income sources, including 'Supplemental Nutrition Assistance Program (SNAP) (Food Stamps)' and 'Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)'. A 'Save and Close' button is highlighted with a red box at the bottom right of the interface.

Definitions of Non-Cash Benefits

- **Food Stamps/Money for Food on Benefits Card** – Monthly payments issued by the government to persons with low income that can be redeemed for food at stores.
- **Special Supplemental Nutrition Program for Women, Infants and Children (WIC)** – A program geared toward supplying nutritional food for at risk pregnant women and their families.
- **TANF Child Care Services** – Child care funding assistance
- **TANF Transportation Services** – Transportation funding assistance
- **Other TANF Funded Services**
- **Section 8, Public Housing or Other Rental Assistance (PSH)** – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development.
- **Temporary Rental Assistance (RRH)** – ESG rental assistance
- **Other Source** – Any source not previously listed above.

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Adult Education Assessment

Complete the required information on the Adult Education Assessment. An education assessment will be prompted for each adult and child in the household. Click **“Save”** to continue in the workflow.

The screenshot shows the ClientTrack interface for the 'Adult Education Assessment' form. The left sidebar contains navigation options like 'Find Client', 'Intake', 'Crisis Call Workflow', and 'CASE MANAGEMENT'. The main content area displays the form for 'Vana White' (DOB: 1/1/1982). The form includes fields for 'Assessment Date' (09/07/2015), 'Currently in School / Working on Degree' (No), 'Received Vocational Training/Apprenticeship' (No), 'Highest Grade Completed' (High school diploma), 'Attendance Status' (Graduated from high school), and 'Secondary Education' (None). A 'Save' button is highlighted with a red box at the bottom right.

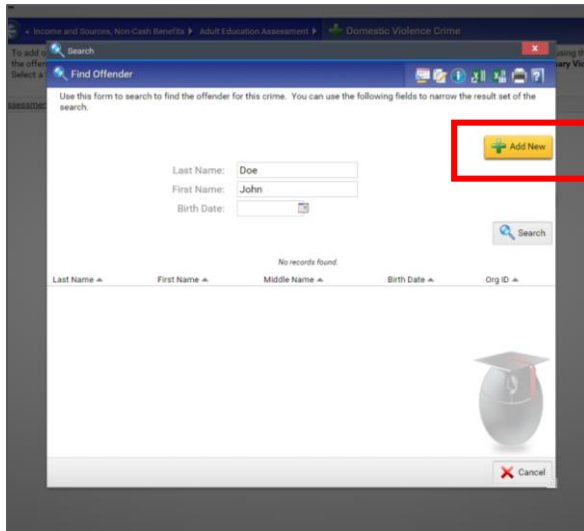
Crimes Assessment

Complete the requested information, noting that all fields with an **asterisk *** are required data elements. You may also click **“Skip”** if the data is not collected or required.

The screenshot shows the ClientTrack interface for the 'Crimes Assessment' form. The left sidebar is the same as the previous screenshot. The main content area displays the form for 'Vana White' (DOB: 1/1/1982). The form includes fields for 'Incident Date' (09/06/2015), 'Abuser' (John Doe), 'Offender Birth Date', 'Relationship to Victim' (Intimate Partner), 'Crime' (Domestic Violence), 'VOCA Victimization Category' (D. Domestic Violence), 'Primary Victimization' (checked), 'Repeat Victim' (No), and a 'Comments' field.

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When you enter the “**Abuser**” name, the system will automatically conduct a search for the person in the system. If this person is a new “**Abuser**,” you can click on the “**Add New**” button to add the new name to the database. Complete all of the required information and click “**Save**” to save the person’s name to the database. When finished adding information to the Crimes Assessment, click “**Save**” or “**Skip**” to move forward in the workflow.



Income and Sources, Non-Cash Benefits > Adult Education Assessment > Domestic Violence Crime

To add the offender, select a...

Find Offender

Use this form to search to find the offender for this crime. You can use the following fields to narrow the result set of the search.

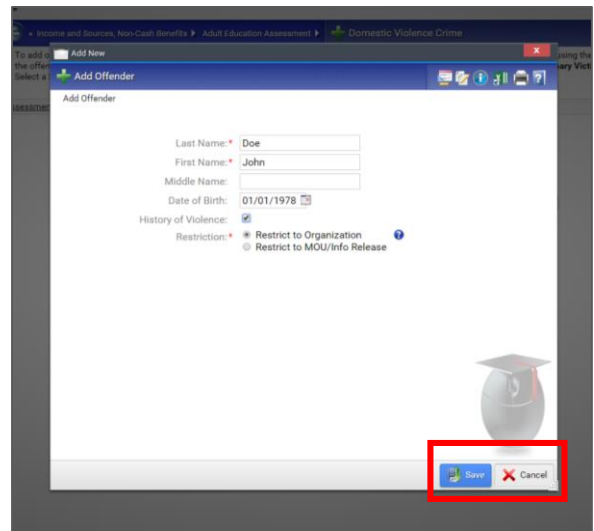
Last Name: Doe
First Name: John
Birth Date: [Calendar Icon]

[Search Icon] Search

No records found!

Last Name < First Name < Middle Name < Birth Date < Org ID <

[Cancel Icon] Cancel



Income and Sources, Non-Cash Benefits > Adult Education Assessment > Domestic Violence Crime

To add the offender, select a...

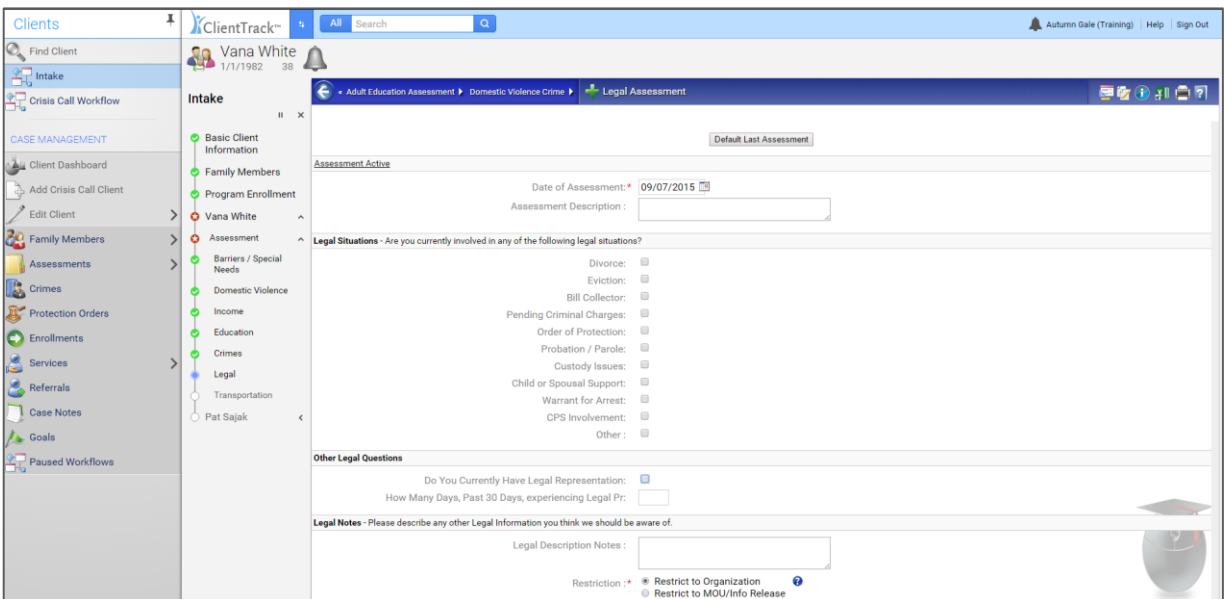
Add Offender

Last Name: * Doe
First Name: * John
Middle Name: [Text Field]
Date of Birth: 01/01/1978 [Calendar Icon]
History of Violence: ☒ Restrict to Organization
Restriction: ☒ Restrict to MOU/Info Release

[Save Icon] Save [Cancel Icon] Cancel

Legal Assessment

Complete the requested information, noting that all fields with an **asterisk *** are required data elements. You may also click “**Skip**” if the data is not collected or required.



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Intake

Basic Client Information
Family Members
Program Enrollment
Assessment
Barriers / Special Needs
Domestic Violence
Income
Education
Crimes
Legal
Transportation
Pat Sajak

Adult Education Assessment > Domestic Violence Crime > Legal Assessment

Default Last Assessment

Assessment Active

Date of Assessment: * 09/07/2015 [Calendar Icon]
Assessment Description: [Text Field]

Legal Situations - Are you currently involved in any of the following legal situations?

Divorce: ☐
Eviction: ☐
Bill Collector: ☐
Pending Criminal Charges: ☐
Order of Protection: ☐
Probation / Parole: ☐
Custody Issues: ☐
Child or Spousal Support: ☐
Warrant for Arrest: ☐
CPS Involvement: ☐
Other: ☐

Other Legal Questions

Do You Currently Have Legal Representation: ☐
How Many Days, Past 30 Days, experiencing Legal Pr: [Text Field]

Legal Notes - Please describe any other Legal Information you think we should be aware of.

Legal Description Notes: [Text Field]

Restriction: * ☒ Restrict to Organization
☒ Restrict to MOU/Info Release

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Transportation Assessment

Complete the requested information, noting that all fields with an **asterisk *** are required data elements. You may also click **“Skip”** if the data is not collected or required.

The screenshot shows the ClientTrack interface for a Transportation Assessment. The left sidebar contains navigation options like 'Find Client', 'Intake', 'Crisis Call Workflow', and 'CASE MANAGEMENT'. The main area displays the assessment form for Vana White (DOB 1/1/1982). The form includes sections for 'Assessment Active' with fields for 'Assessment Date' (09/07/2015) and 'Primary Transit Means' (Own Vehicle). The 'Vehicle' section contains fields for 'Vehicle Ownership' (Own), 'Vehicle Make' (Honda), 'Vehicle Model' (Civic), 'Vehicle Year' (2002), 'Vehicle Description' (Green, four door sedan), 'Vehicle Condition' (In need of repair), 'Registered State' (IN), 'License Plate Number' (GHI 111), 'Insurance Company' (State Farm), and 'Insurance Renewal Date' (11/01/2015). The 'Drivers License' section includes fields for 'License Number' (000-01-0000), 'License State' (IN), 'License Expiration Date' (07/16/2017), and 'Restriction' (Restrict to Organization). 'Save' and 'Skip' buttons are at the bottom right.

Universal Data Assessment for Child

Complete the required data elements for the child on the HMIS Universal Data Assessment. You will notice that the child's assessment does not require as much information as the adult's assessment. Click **“Save”** when finished with the assessment to continue in the workflow.

The screenshot shows the ClientTrack interface for a Universal Data Assessment. The left sidebar is the same as the previous form. The main area displays the assessment form for Vana White. The form includes fields for 'Assessment Date' (09/07/2015), 'Age at Assessment' (3), 'Assessment Type' (Entry), 'Assessor' (Autumn Gale), 'Program' (My Fake DV Shelter), and 'Housing Status' (Category 1 - Homeless). The 'Health Insurance' section has a 'Health Insurance' dropdown (Yes) and a 'Note on Existing Sources' section. Below this is a table for health insurance sources:

Type	Is Primary Status	Reason No	Start Date	End Date	Restriction
Combined Children's Health Insurance / Medicaid Program	Active		08/01/2014		Restrict to Organization
-- SELECT --	-- SELECT --				-- SELECT --

At the bottom, there are 'Restriction' options: 'Restrict to Organization' and 'Restrict to MOU/Info Release'. 'Save' and 'Skip' buttons are at the bottom right.

CLIENTTRACK USER MANUAL

Barriers Assessment for Child

Complete any barrier information for the child you are enrolling. If **no barriers** are present at enrollment, select all barriers and leave the “**Barrier Present**” status as “**No**” and click “**Save & Close**.”

The screenshot shows the ClientTrack interface for a child named Vana White. The left sidebar contains navigation options like Find Client, Intake, Crisis Call Workflow, and CASE MANAGEMENT. The main area displays the 'Barriers' assessment form. At the top, it says 'Universal Data Assessment' and 'Barriers'. Below this, there's a section for 'Assessment Active' with a date of 09/07/2015. A table lists various barriers with checkboxes for 'Barrier Present' and 'No'. The barriers listed are Alcohol Abuse, Chronic Health Condition, Developmental Disability, Drug Abuse, HIV/AIDS, Mental Health, and Physical Disability. All 'Barrier Present' checkboxes are checked, and all 'No' checkboxes are unchecked. There are also fields for 'Receiving Services / Treatment', 'Condition is Indefinite', 'Documentation of the disability and severity on file', 'Explanation', and 'Previous Barrier Details'.

Domestic Violence Assessment for Child

Complete the requested information, noting that all fields with an **asterisk *** are required data elements. Click “**Next**” to proceed in the workflow.

The screenshot shows the ClientTrack interface for a child named Pat Sajak. The left sidebar contains navigation options like Find Client, Intake, Crisis Call Workflow, and CASE MANAGEMENT. The main area displays the 'Domestic Violence Assessment of Victim' form. At the top, it says 'Universal Data Assessment' and 'Domestic Violence Assessment of Victim'. Below this, there's a section for 'Assessment Active' with a date of 09/07/2015. The form includes fields for 'Victim Information' such as 'Is client a victim of domestic violence*', 'Victimization Date', 'Victimization Type', 'Age at Time of Incident', 'Interviewer', and 'Assessment Description'. There are also checkboxes for 'Physical', 'Sexual', 'Psychological', 'Stalking', and 'Human Trafficking'. A 'Weapon Used' dropdown menu is set to '- SELECT -'. At the bottom right, there are 'Next' and 'No Changes' buttons.

CLIENTTRACK USER MANUAL

Domestic Violence Assessment for Child Continued

The screenshot shows the ClientTrack interface for client Pat Sajak. The left sidebar contains navigation options like Find Client, Intake, Crisis Call Workflow, and CASE MANAGEMENT. The main content area is titled 'Domestic Violence Assessment of Victim'. It includes sections for 'OTHER INFORMATION AND OFFENDERS RELATIONSHIP TO VICTIM' and 'Offender's Relationship to Victim'. The 'Offender's Relationship to Victim' section shows 'Relationship to Victim: Other Family Member'.

The screenshot shows the 'Legal / Crime Information' section of the Domestic Violence Assessment for Victim. It includes fields for 'Law Enforcement Called', 'Abuser Arrested', 'Incident Report Filed', and 'Signer of Report'. The 'Legal / Resolution' section includes checkboxes for 'Criminal Complaint Filed', 'Went to Court', 'Convicted', 'Civil Resolution', 'No Legal Resolution', and 'Restriction'.

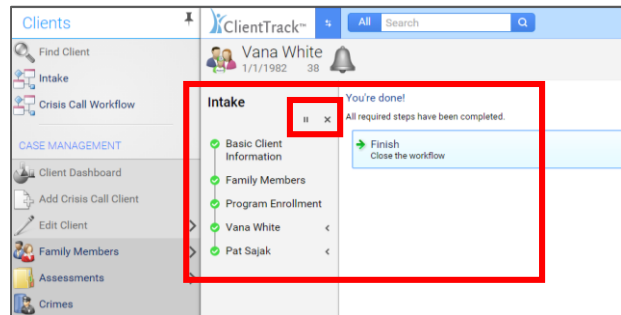
Child Education Assessment

Enter the **“Highest Grade Completed”** for the child, and then select if the child is **“Currently Enrolled in School.”** The built in logic may require additional information depending on how you answer the questions. Click **“Save”** when completed.

The screenshot shows the ClientTrack interface for client Vana White. The left sidebar contains navigation options like Find Client, Intake, Crisis Call Workflow, and CASE MANAGEMENT. The main content area is titled 'Child Education Assessment'. It includes fields for 'Assessment Date', 'Highest Grade Completed', 'Current Enrollment Status', 'Type of School', 'School Name', 'Connected with McKinney-Vento School Liaison?', 'Comments', and 'Restriction'.

CLIENTTRACK USER MANUAL

Completing the Intake Workflow

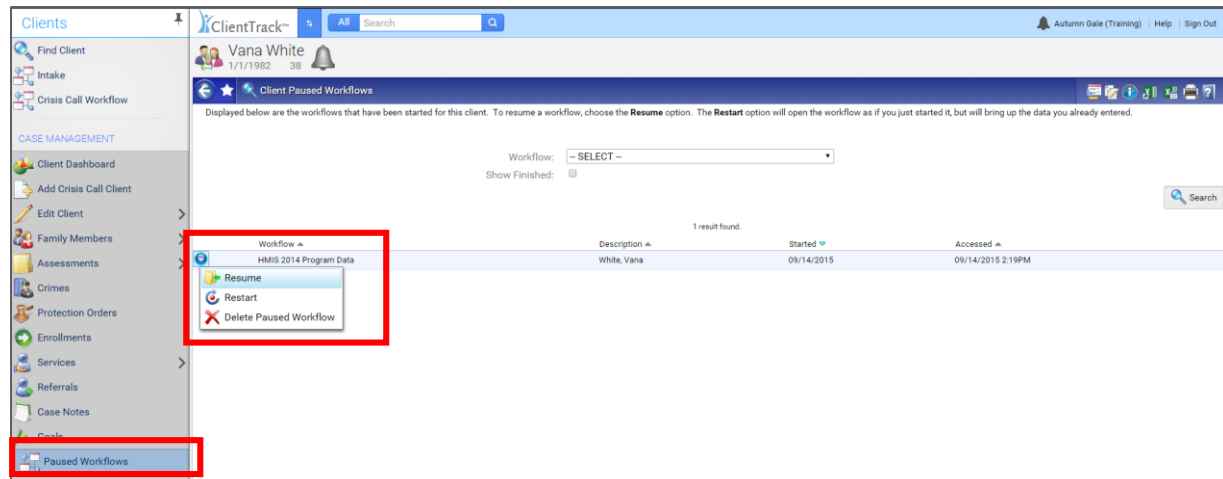


Once you have completed the required entry assessments for your client and household members, you will be prompted to **“Finish”** the workflow. If the workflow is complete then click **“Finish.”** You will then be directed back to the head of household’s client record and you can see the new enrollment under the **“Enrollments”** section on the client record.

If you need to go back and change information entered in the workflow prior to finishing, you can click on the specific section of the workflow you wish to return to in the workflow window that appears in the upper left-hand corner of the client record (outlined in red above). Clicking on the link beside the green dot will take you to that specific section of the workflow where you can edit information.

Pausing a Workflow

You may also **“Pause”** a workflow by clicking on the pause button located in upper right-hand corner of the workflow window beside the black **“X”** (outlined in red above). The black **“X”** will delete the workflow. The pause feature will allow you to pause the workflow at any time so you can return to it later.

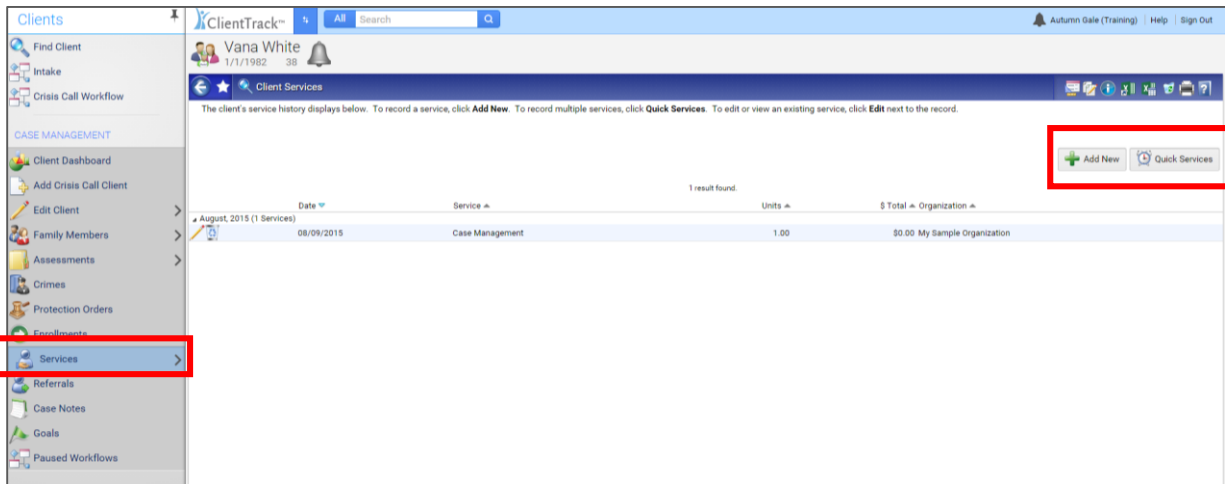


To **resume a paused workflow**, click on **“Paused Workflows”** at the bottom of the list of case management tools located on the left-hand side of the client record. Then click on the blue play button beside your paused workflow to select **“Resume”** in the drop down. This will take you to where you paused the workflow and you can finish your program enrollment.

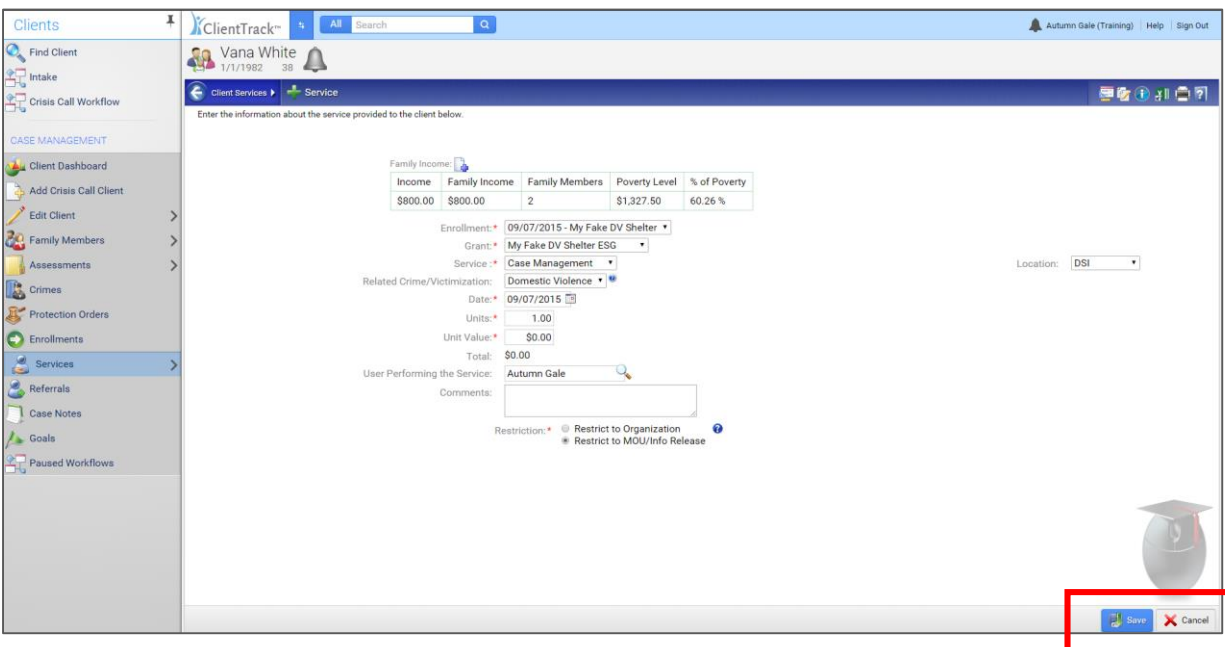
CLIENTTRACK USER MANUAL

ADDING SERVICES

After completing an enrollment for a client, you can document services associated with the program enrollment with the “**Services**” link located in the list of case management tools on the left-hand side of the client record. This will open the Services window where you can “**Add New**” services or manage current services.



To document a new services, click on “**Add New.**” You will see the Services home screen where you select the enrollment associated with the service and the service provided. You can also enter units (1.00 unit = one hour of case management or a bus pass) to track costs. The comments section can be used for reminders; however, this is not an area for case notes. Case Notes will be covered later in the manual.



CLIENTTRACK USER MANUAL

Please note that services can be tailored to your organization's needs. If a service does not appear in your agency's options, contact the help desk to request that it be added.

When you are finished documenting a service, click on the **"Save"** button and you will be taken back to the Services window where you can edit or delete a service you created.

Quick Services

When you need to add more than one service and the services were provided on the same date, you can use the **"Quick Services"** option to document all of the services at the same time. The **"Quick Services"** button is located beside the **"Add New"** button on the Services window or when hovering over the **"Services"** link in the list of case management tools. With this feature you can add multiple services to a client record at one time by selecting the **"Enrollment"** and checking the services with the **"Check Box"** next to the service you provided.

ClientTrack - Vana White 1/1/1982 38

Quick Service

Please address the following:
There are 2 rows in the result set that require attention.

Use the Service Screen list to filter services available. You may also filter services available by Grant and/or Provider. Select the services the client has received and verify the Units and Unit Values.

Service Screen: Direct Services

Family Income:

Income	Family Income	Family Members	Poverty Level	% of Poverty
\$800.00	\$800.00	2	\$1,327.50	60.26 %

Date: 09/07/2015
Grant: My Fake DV Shelter ESG
Provider Name: - SELECT -
Related crime/victimization: - SELECT -
Enrollment: 09/07/2015 - My Fake DV Shelter
User Performing the Service(s): Autumn Gale
Location: DSI

2 results found

Service	Unit Type	Units	Unit Value	Total	Help	Restriction
Case Management (1)	Hours	1.00	\$0.00	\$0.00		Restrict to Organization
Counseling/Support (1)	Count	1.00	\$1.00	\$1.00		Restrict to Organization
Crisis Intervention	Count	1.00	\$1.00	\$1.00		Restrict to Organization

Save Save & Close Cancel

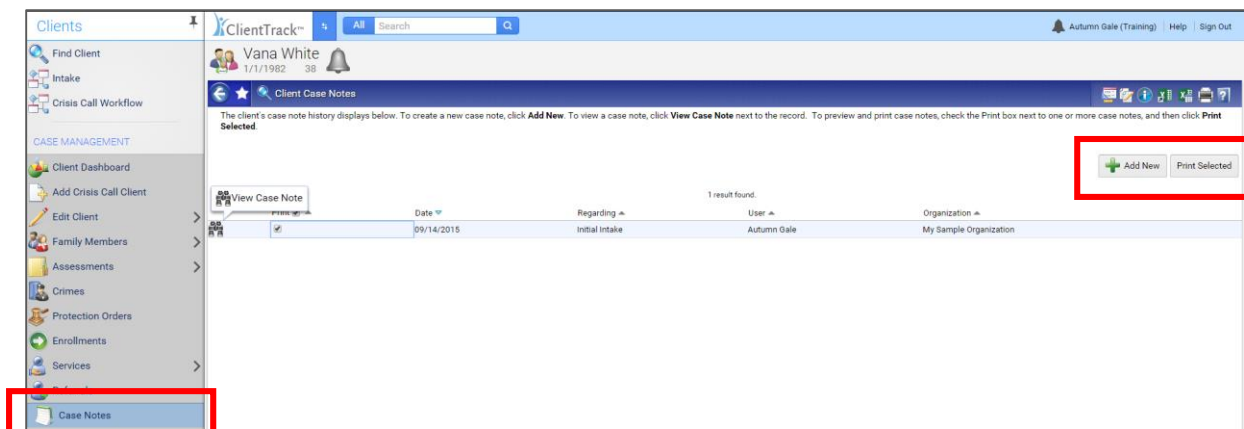
Once you are finished adding multiple services click on the **"Save & Close"** button and you will return to the Services window where you can view and manage services. Please note that some initial set up may be required to utilize this feature. You can also tailor your services, so contact the help desk if you need assistance with the Quick Services feature.

CLIENTTRACK USER MANUAL

CASE NOTES

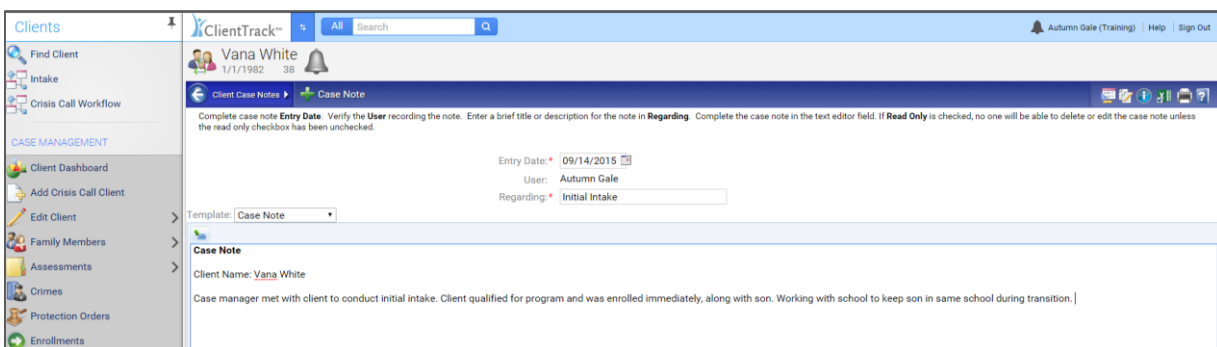
Timely and robust case notes assist you and other case managers at your organization in serving your clients. It is extremely important that meetings, calls and other relevant information regarding your client are properly documented in case notes.

To add case notes, click on the “**Case Notes**” link in the list of case management tools on the left-hand side of the screen. Click on the “**Add New**” button on the upper right-hand side of the screen.



Any case notes created for a client are restricted to case managers within your organization. No one outside of your agency can view your case notes.

An example of a case note is below as well as an example of a case note with the option to document a service simultaneously (seen on the next page). Templates can also be set up for housing plans or any other specific required documentation so it can easily be drafted as a case note. Notify the help desk with any template requests.



Once a case note is created, it will appear in a list of case notes on the Case Notes home screen. You can click on the binoculars beside a case note to review it. You can also select case notes to print by clicking on the “**Print**” box located in the far column and clicking on the “**Print Selected**” button beside the “**Add New**” button as seen on the previous page. This will print all of the “checked” case notes.

CLIENTTRACK USER MANUAL

ClientTrack - Vana White (BIRTH DATE: 1/1/1982, CLIENTID: 38)

Client Case Notes - Case Note with Services

Template: Case Note

User: Autumn Gale (Training) | Help | Sign Out

Case Note

Client Name: Vana White

Case Manager met with client to conduct initial intake to determine eligibility.

Services: Use the fields below to record the services provided in association with the note above.

Default Enrollment: 09/07/2015 - My Fake DV Shelter

Grant	Service	Units of Measure	Unit Value	Units	Total
My Fake DV Shelter ESG	Case Management	Hours	\$0.00	1.00	\$0.00
-- SELECT --	-- SELECT --	-- SELECT --			

UPDATE/ANNUAL ASSESSMENT

For clients who spend longer periods of time in your program or to document any changes in your client's status since entry, you can conduct an **"Update/Annual Assessment"** formerly known as the During Program Enrollment Assessment. This assessment is required if clients are enrolled in your program for a year or longer, and some programs require more frequent assessments so be sure to check your program requirements for the Update/Annual Assessment.

The Update/Annual Assessment is also helpful for tracking significant changes to a household – for example a client gets a job and the income changes or a client receives his/her GED. For your convenience, the assessment has been developed as a workflow with the following steps:

- Click on the blue play button beside your program enrollment;
- Select **"Update/Annual Assessment"** from the drop down list; and
- Complete the required assessments prompted by the workflow and save as you go.

Vana's Enrollments

Enrollment	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
Current	2	09/07/2015		My Sample Organization	09/07/2015	248	
	1	12/01/2014	08/09/2015	My Sample Organization	01/05/2015	29	236

2 results found.

Update/Annual Assessment

CLIENTTRACK USER MANUAL

The first screen you will be taken to will review the household members and the enrollment. Click **“Save”** or **“No Changes”** in the bottom right-hand corner to continue in the workflow.

This screenshot shows the 'HUD Program Enrollment' screen in ClientTrack. The left sidebar contains navigation options like 'Find Client', 'Intake', 'Crisis Call Workflow', and 'CASE MANAGEMENT'. The main area displays the client's information (Vana White, 1/1/1982) and a table of household members. The 'Program' is set to 'My Fake DV Shelter'. A 'Restriction' section at the bottom allows selecting 'Restrict to Organization' or 'Restrict to MOU/Info Release'.

Name	Gender	Age	Project Entry Date	Case Manager	Relationship to Head of Household
White, Vana	Female	33	09/07/2015	Autumn Gale	Self
Sajak, Pat	Male	3	09/07/2015	Autumn Gale	Son

Universal Data Assessment

You will then review the head of household's universal data where you can document any changes. Please note that you can change the assessment date at the top of the screen to reflect the actual date of the assessment if done at another time. You may also use the **“Default Last Assessment”** button at the top of the screen if the data that was entered on the last assessment has remained the same.

This screenshot shows the 'Universal Data Assessment' screen. It includes a 'Default Client's Last Assessment' button highlighted with a red box. Below this, there are fields for 'Assessment Date' (09/14/2015), 'Age at Assessment' (33), 'Assessment Type' (During Program Enrollment), 'Assessor' (Autumn Gale), and 'Program' (My Fake DV Shelter). The 'Client Location' section shows 'Indiana' as the state and 'Indiana Balance of State' as the location. The 'Health Insurance' section is set to 'Yes'. A 'Note on Existing Sources' section is also present. At the bottom, there is a table for 'Type' (Medicaid) and 'Is Primary Status' (Active), with a 'Save' button highlighted by a red box.

Type	Is Primary Status	Reason No	Start Date	End Date	Restriction
Medicaid	Active		09/09/2015		Restrict to Organization
-- SELECT --	-- SELECT --				-- SELECT --

CLIENTTRACK USER MANUAL

Barriers Assessment

Review the HMIS Barriers and make any changes necessary. You may use the **“Default Last Assessment”** button at the top of the screen if the data that was entered on the last assessment has remained the same. This is a helpful feature if an assessment requires significant data entry. It will populate all of the information previously entered for you. If **no barriers** are present at this time, select all barriers and leave the **“Barrier Present”** status as **“No”** and click **“Save & Close.”**

The screenshot shows the ClientTrack interface for a Barriers Assessment. The left sidebar contains navigation links for Clients, Intake, Crisis Call Workflow, and various assessment categories. The main content area displays the 'Annual Assessment' for 'Vana White' (DOB 1/1/1982). The 'Barriers' section is active, showing a table of barriers with columns for Barrier, Barrier Present?, Receiving Services / Treatment, Condition is Indefinite, Documentation of the disability and severity on file, Explanation, and Previous Barrier Details. The table lists barriers such as Alcohol Abuse, Chronic Health Condition, Developmental Disability, Drug Abuse, HIV/AIDS, Mental Health, and Physical Disability, all with a 'No' status. At the bottom right, the 'Save' and 'Save & Close' buttons are highlighted with a red box.

Domestic Violence Assessment

The screenshot shows the ClientTrack interface for a Domestic Violence Assessment. The left sidebar is the same as the previous screenshot. The main content area displays the 'Domestic Violence Assessment of Victim' form for 'Vana White'. The 'Default Client's Last Assessment' button is highlighted with a red box. Below this, the 'Victim Information' section contains fields for Assessment Date (09/14/2015), Is client a victim of domestic violence (Yes), When Exp Occurred (Within the past three months), Victimization Date (09/07/2015), Victimization Type (Primary Victimization), Age at Time of Incident (33), Interviewer (Autumn Gale), and Assessment Description (Initial Intake). The 'Domestic Violence' section at the bottom includes a note and an 'Interview Type' section with radio buttons for 'In-Person' and 'Phone Call Only'.

Review the Domestic Violence assessment for the head of household and document any changes. You may click on the **“Default Last Assessment”** button at the top of the assessment to populate the client’s information previously entered. Be sure move through the entire assessment and click **“Save and Close”** when finished.

CLIENTTRACK USER MANUAL

ClientTrack - Vana White (1/1/1982)

Annual Assessment

Domestic Violence Assessment of Victim

Other Information and Offender's Relationship to Victim

Other Information

Child Abuse: ☒
 Physical Abuse: ☒
 Psychological Abuse: ☒
 Child Witnessed Abuse: ☐
 Abuse through Neglect: ☐
 Other Type of Abuse:

Offender's Relationship to Victim

Relationship to Victim:

Complete all of the sections of the Domestic Violence Assessment. All fields with an **asterisk *** are required fields. Make any changes necessary and click **"Next"** to prompt through the assessment. Once all of the Domestic Violence Assessment has been completed, click **"Finish."**

ClientTrack - Vana White (1/1/1982)

Annual Assessment

Domestic Violence Assessment of Victim

Legal / Crime Information

Legal Information - Enter the legal information relative to the specific victim situation below.

Law Enforcement Called: ☒
 Abuser Arrested: ☒
 Incident Report Filed: ☒
 Signer of Report:

Legal / Resolution - Please check all that apply.

Criminal Complaint Filed: ☐
 Went to Court: ☐
 Convicted: ☐
 Civil Resolution: ☐
 No Legal Resolution: ☒
 Restriction: ☒ Restrict to Organization
 Restriction: ☐ Restrict to MOU/Info Release

Financial Assessment

ClientTrack - Vana White (1/1/1982)

Annual Assessment

Domestic Violence Assessment of Victim

Income

Assessment Active

Assessment Date: 09/14/2015
 Income from Any Source: ☒
 Non-Cash Benefits from Any Source: ☒

Type	Description	Monthly Amount	Restriction
<input checked="" type="checkbox"/> Earned Income (i.e., employment income)	Part-time employment	\$800.00	Restrict to Organization
<input type="checkbox"/> Unemployment Insurance			Restrict to Organization
<input type="checkbox"/> Supplemental Security Income (SSI)			Restrict to Organization
<input type="checkbox"/> Social Security Disability Income (SSDI)			Restrict to Organization
<input type="checkbox"/> Veteran's Disability Payment			Restrict to Organization
<input type="checkbox"/> Private Disability Insurance			Restrict to Organization
<input type="checkbox"/> Worker's Compensation			Restrict to Organization
<input type="checkbox"/> Temporary Assistance for Needy Families (TANF)			Restrict to Organization
Count/Total Monthly Income		1	\$800.00

Default Last Assessment

Review the Financial information for the head of household and document any changes to the household income. Be sure to scroll down to complete the Non-Cash Benefits if applicable and click **"Save and Close."**

CLIENTTRACK USER MANUAL

Adult Education Assessment

Complete the Adult Education Assessment. Remember that all fields with an **asterisk *** are required. The **“Default Client’s Last Assessment”** will populate information from the previous assessment completed and is helpful if the client’s information has not changed. Click **“Save”** when finished.

The screenshot shows the ClientTrack interface for the 'Adult Education Assessment' of Vana White. The left sidebar contains navigation links like 'Find Client', 'Intake', 'Crisis Call Workflow', and 'CASE MANAGEMENT'. The main content area has a breadcrumb trail: 'Domestic Violence Assessment of Victim' > 'Income and Sources, Non-Cash Benefits' > 'Adult Education Assessment'. A red box highlights the 'Default Client's Last Assessment' button. Below this, the 'Assessment Active' section contains various fields: 'Assessment Date' (09/14/2015), 'Currently in School / Working on Degree' (No), 'Received Vocational Training/Apprenticeship' (No), 'Highest Grade Completed' (GED), 'Attendance Status' (Obtained GED), and 'Secondary Education' (None). A dropdown menu for 'Secondary Education' is open, showing options like 'Associates Degree', 'Bachelors', 'Masters', 'Doctorate', and 'Other graduate/professional degree'. At the bottom, there are checkboxes for 'Restriction'.

Crimes Assessment

Complete the requested information, noting that all fields with an **asterisk *** are required data elements. You may also click **“Skip”** if the data is not collected or required.

The screenshot shows the ClientTrack interface for the 'Crimes Assessment' of Vana White. The left sidebar is the same as the previous screenshot. The main content area has a breadcrumb trail: 'Income and Sources, Non-Cash Benefits' > 'Adult Education Assessment' > 'Domestic Violence Crime'. A text box at the top provides instructions: 'To add or edit a domestic violence crime for which the current client is identified as the victim, enter an Incident Date. Select an Offender using the lookup. Offender's Birth Date will display. Select a Relationship to Victim for the offender. Select the Crime and Amended Charge if applicable. Select a VOCA Victimization Category for VOCA reporting. Check Primary Victimization if this is the primary charge for this client on the incident date. Select a Status and Court Case if applicable. Enter any Comments.' Below this, the 'Assessment Active' section contains fields: 'Incident Date' (09/07/2015), 'Abuser' (Doe, John), 'Offender Birth Date' (1/1/1978 12:00:00 AM), 'Relationship to Victim' (Intimate Partner), 'Crime' (Domestic Violence), 'VOCA Victimization Category' (D. Domestic Violence), 'Primary Victimization' (checked), 'Repeat Victim' (No), and a 'Comments' text area.

CLIENTTRACK USER MANUAL

Legal Assessment

Complete the requested information, noting that all fields with an **asterisk *** are required data elements. You may also click **“Skip”** if the data is not collected or required.

The screenshot shows the ClientTrack interface for a Legal Assessment. The left sidebar lists various assessment categories, with 'Legal' selected. The main form area is titled 'Legal Assessment' and includes a 'Default Last Assessment' button highlighted with a red box. The form contains fields for 'Date of Assessment' (09/14/2015), 'Assessment Description', and a section for 'Legal Situations' with checkboxes for various legal issues like Divorce, Eviction, and Pending Criminal Charges. There is also a section for 'Other Legal Questions' and a 'Legal Notes' section.

Transportation Assessment

Complete the requested information, noting that all fields with an **asterisk *** are required data elements. You may also click **“Skip”** if the data is not collected or required.

The screenshot shows the ClientTrack interface for a Transportation Assessment. The left sidebar lists various assessment categories, with 'Transportation' selected. The main form area is titled 'Transportation Assessment' and includes a 'Default Client's Last Assessment' button. The form contains fields for 'Assessment Date' (09/14/2015), 'Primary Transit Means' (Own Vehicle), and a section for 'Vehicle' details including ownership, make, model, year, description, condition, registered state, license plate number, insurance company, and renewal date. There is also a section for 'Drivers License' with fields for license number, state, and expiration date. At the bottom right, there are 'Save' and 'Skip' buttons highlighted with a red box.

CLIENTTRACK USER MANUAL

Universal Data Assessment for Child

After completing all of the updated assessments for the head of household, you will be prompted through the assessments for all enrolled household members. The adult assessments will look like the head of household's assessments. The Update/Annual Assessment will look differently for children.

The screenshot shows the 'Universal Data Assessment' form for a child named White, Vana. The form includes fields for Assessment Date (09/14/2015), Age at Assessment (3), Assessment Type (During Program Enrollment), Assessor (Autumn Gale), and Program (My Fake DV Shelter). A 'Health Insurance' section asks if the client is covered by health insurance, with a 'Yes' selection. Below this is a table for 'Existing Sources' with columns for Type, Primary Status, Reason No, Start Date, End Date, and Restriction. The table shows 'Combined Children's Health Insurance / Medicaid Program' as 'Active' starting 08/01/2014, restricted to the organization. A 'Save' button is highlighted with a red box at the bottom right.

Type	Primary Status	Reason No	Start Date	End Date	Restriction
Combined Children's Health Insurance / Medicaid Program	Active		08/01/2014		Restrict to Organization
- SELECT -	- SELECT -				- SELECT -

Barriers Assessment for Child

Complete the Barriers Assessment for the child. If no barriers are reported, click **"Save & Close"** to continue in the workflow. If **no barriers** are present at this time, select all barriers and leave the **"Barrier Present"** status as **"No"** and click **"Save & Close."**

The screenshot shows the 'Barriers' assessment form for the same child. It includes a table with columns for Barrier, Help, Barrier Present?, Receiving Services / Treatment, Condition is Indefinite, Documentation of the disability and severity on file, Explanation, and Previous Barrier Details. The table lists various barriers such as Alcohol Abuse, Chronic Health Condition, Developmental Disability, Drug Abuse, HIV/AIDS, Mental Health, and Physical Disability, all with 'No' in the 'Barrier Present?' column. A 'View Barrier History' button is visible at the top right.

Barrier	Help	Barrier Present?	Receiving Services / Treatment	Condition is Indefinite	Documentation of the disability and severity on file	Explanation	Previous Barrier Details
Alcohol Abuse		No					Previous Barrier
Chronic Health Condition		No					Previous Barrier
Developmental Disability		No					Previous Barrier
Drug Abuse		No					Previous Barrier
HIV/AIDS		No					Previous Barrier
Mental Health		No					Previous Barrier
Physical Disability		No					Previous Barrier

CLIENTTRACK USER MANUAL

Domestic Violence Assessment for Child

Review the Domestic Violence assessment for the child and document any changes. You may click on the **“Default Last Assessment”** button at the top of the assessment to populate the client’s information previously entered. Be sure to move through the assessment until it’s completed and click **“Save and Close”** when finished.

The screenshot displays the ClientTrack software interface. On the left is a sidebar with navigation options: Find Client, Intake, Crisis Call Workflow, and a CASE MANAGEMENT section containing Client Dashboard, Add Crisis Call Client, Edit Client, Family Members, Assessments, Crimes, Protection Orders, Enrollments, Services, Referrals, Case Notes, Goals, and Paused Workflows. The main area shows the 'Annual Assessment' for 'Pat Sajak' (12/1/2011, 253). The 'Domestic Violence Assessment of Victim' form is active, with a 'Default Client's Last Assessment' button at the top. The form includes sections for 'Victim Information' (Assessment Date: 09/14/2015, Is client a victim of domestic violence: Yes, When Exp Occurred: Within the past three months, Victimization Date: 09/04/2015, Victimization Type: Secondary Victimization, Age at Time of Incident: 3, Interviewer, Assessment Description) and 'Domestic Violence' (Interview Type: In-Person, Physical, Sexual, Psychological, Stalking, Human Trafficking checkboxes, Weapon Used, Associated with DV - Alcohol, Associated with DV - Drugs, Length of Violent Relationship dropdowns). A 'Print' button is in the bottom right.

This screenshot shows the continuation of the 'Domestic Violence Assessment of Victim' form. The 'Other Information and Offender's Relationship to Victim' section is active. It includes a section for 'Other Information' with checkboxes for Child Abuse, Physical Abuse, Psychological Abuse, Child Witnessed Abuse, and Abuse through Neglect, followed by an 'Other Type of Abuse' dropdown. The 'Offender's Relationship to Victim' section contains a 'Relationship to Victim' dropdown menu currently set to 'Other Family Member'. The interface elements (sidebar, client info, and top navigation) are consistent with the previous screenshot.

CLIENTTRACK USER MANUAL

Domestic Violence Assessment for Child Continued

The screenshot shows the ClientTrack interface with the 'Domestic Violence Assessment of Victim' form open. The form is divided into three main sections: 'LEGAL / CRIME INFORMATION', 'Legal / Resolution', and 'Restriction'. The 'LEGAL / CRIME INFORMATION' section includes fields for 'Law Enforcement Called', 'Abuser Arrested', 'Incident Report Filed', and 'Signer of Report'. The 'Legal / Resolution' section includes checkboxes for 'Criminal Complaint Filed', 'Went to Court', 'Convicted', 'Civil Resolution', and 'No Legal Resolution'. The 'Restriction' section includes checkboxes for 'Restrict to Organization' and 'Restrict to MOU/Info Release'.

Child Education Assessment

Enter the **“Highest Grade Completed”** for the child, and then select if the child is **“Currently Enrolled in School.”** The built in logic may require additional information depending on how you answer the questions. You may also click on the **“Default Last Assessment”** button to populate what was previously entered if there has been no change to the education information. Click **“Save”** when completed.

The screenshot shows the ClientTrack interface with the 'Child Education Assessment' form open. The form includes fields for 'Assessment Date', 'Highest Grade Completed', 'Current Enrollment Status', 'Type of School', 'School Name', 'Connected with McKinney-Vento School Liaison?', and 'Comments'. There is a 'Default Last Assessment' button and a 'Restriction' section with checkboxes for 'Restrict to Organization' and 'Restrict to MOU/Info Release'.

Once you have completed the required entry assessments for your client and household members, you will be prompted to **“Finish”** the workflow. If the workflow is complete then click **“Finish.”** You will then be directed back to the head of household’s client record.

The screenshot shows the ClientTrack interface with a 'Finish' prompt. The prompt says 'You're done! All required steps have been completed.' and includes a 'Finish' button and a 'Close the workflow' button.

CLIENTTRACK USER MANUAL

Program Discharge

When a client has transitioned from your project or is no longer receiving services for any reason, you will discharge the client from your program in ClientTrack with the following steps:

- Go to the client record;
- Click on the blue play button beside your project enrollment located in the center of the client record;
- Select **“Exit the Enrollment”** in the drop down list that appears after clicking on the blue play button; and
- Complete the information prompted for through the exit workflow and save as you go.

The screenshot shows the ClientTrack interface for a client named Vana White. The left sidebar contains navigation options like 'Find Client', 'Intake', 'Crisis Call Workflow', and 'CASE MANAGEMENT'. The main area displays 'Vana White's Information' and 'Vana's Enrollments'. A dropdown menu is open, showing options like 'Current', 'Edit Enrollment Workflow', 'Add Family Member', 'View Case Members', 'Review Entry Assessments', 'Update/Annual Assessment', and 'Exit the Enrollment'. The 'Exit the Enrollment' option is highlighted.

Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
My Fake DV Shelter	2	09/07/2015		My Sample Organization	09/14/2015	248	
	1	12/01/2014	08/09/2015	My Sample Organization	01/05/2015	29	236

Begin Date	Status	End Date	Enrollment
09/07/2015	Active		My Fake DV Shelter
12/01/2014	Inactive	01/05/2015	Transitional Housing

On the first screen of the exit workflow, you will be asked for the **“Exit Date,” “Destination,” “Exit Reason,”** and whether to **“End Case Assignment.”** Please note that all fields with an **asterisk *** are required. Be sure to change the exit date to reflect the actual discharge date. Click **“Save”** when finished.

The screenshot shows the 'Enrollment Exit' form in ClientTrack. The form is titled 'HUD Program Exit' and 'Enrollment Exit'. It prompts the user to 'To exit the client from the Enrollment, enter the Exit Date and Destination.' The form fields include:

- Exit Date: 09/14/2015
- Destination: Transitional Housing for homeless persons (including homeless youth)
- Exit Reason: Left for a housing opportunity before completing program
- Case Manager Assignment: Autumn Gale
- End Case Assignment: [checked]

CLIENTTRACK USER MANUAL

Universal Data at Exit

You will then review the head of household's universal data where you can document any changes. Please note that you can change the assessment date at the top of the screen to reflect the actual date of the assessment if entered at another time. Click **"Save"** when finished.

The screenshot shows the 'Universal Data Assessment' form for client Vana White. The form includes fields for Assessment Date (09/14/2015), Age at Assessment (33), Assessment Type (Exit), Assessor (Autumn Gale), and Program (My Fake DV Shelter). It also has a section for Health Insurance with a dropdown set to 'Yes'. A note mentions existing insurance sources. At the bottom, there is a table for insurance sources with columns for Type, Is Primary Status, Reason No, Start Date, End Date, and Restriction. The table shows one entry for Medicaid, which is Active, starting on 09/09/2015, and restricted to the organization.

Type	Is Primary Status	Reason No	Start Date	End Date	Restriction
Medicaid	Active		09/09/2015		Restrict to Organization

Barriers at Exit

You will be required to complete the HMIS Barriers Assessment at exit. The built in logic may create additional required fields. If **no barriers** are present at this time, select all barriers and leave the **"Barrier Present"** status as **"No"** and click **"Save & Close."**

The screenshot shows the 'Barriers' assessment form for client Vana White. It includes a table for identifying barriers with columns for Barrier, Help, Barrier Present?, Receiving Services / Treatment, Condition is Indefinite, Documentation of the disability and severity on file, Explanation, and Previous Barrier Details. The table lists six barriers: Alcohol Abuse, Chronic Health Condition, Developmental Disability, Drug Abuse, HIV/AIDS, and Physical Disability. All 'Barrier Present?' fields are set to 'No'. There is a 'View Barrier History' button in the top right corner.

Barrier	Help	Barrier Present?	Receiving Services / Treatment	Condition is Indefinite	Documentation of the disability and severity on file	Explanation	Previous Barrier Details
Alcohol Abuse		No					Previous Barrier
Chronic Health Condition		No					Previous Barrier
Developmental Disability		No					Previous Barrier
Drug Abuse		No					Previous Barrier
HIV/AIDS		No					Previous Barrier
Mental Health		No					Previous Barrier
Physical Disability		No					Previous Barrier

CLIENTTRACK USER MANUAL

Financial Assessment at Exit

Complete the Financial information for the head of household at exit and document any changes to the household income. Be sure to scroll down to complete Non-Cash Benefits and click **“Save and Close”** when finished.

ClientTrack HUD Program Exit

Vana White
1/1/1982 38

Enrollment Exit Universal Data Assessment Income and Sources, Non-Cash Benefits

Indicate below the client's sources of **monthly** income, non-cash benefits and expenses.

The following instructions are quoted from the HMIS Data Manual:

- When a client has income, but does not know the exact amount, a "Yes" response should be recorded for both the overall income question and the specific source, and the income amount should be estimated.
- Income received by or on behalf of a minor child should be recorded as part of household income under the Head of Household, unless the federal funder in the HMIS Program Specific Manual instructs otherwise. Income should be recorded at the client-level for heads of household and adult household members. Projects may choose to collect this information for all household members including minor children, as long as this does not interfere with accurate reporting per funder requirements. Projects collecting data through client interviews should ask clients whether they receive income from each of the sources listed rather than asking them to state the sources of income they receive.
- Income data should be recorded only for sources of income that are current as of the information date (i.e. have not been specifically terminated). As an example, if a client's employment has been terminated and the client has not yet secured additional employment, the response for Earned income would be "No." As a further example, if a client's most recent paycheck was 2 weeks ago from a job in which the client was working full time for \$15.00/hour, but the client is currently working 20 hours per week for \$12.00 an hour, record the income from the job the client has at the time data are collected (i.e. 20 hours at \$12.00 an hour).

Default Last Assessment

Assessment Active

Assessment Date: 09/14/2015
Income from Any Source: Yes
Non-Cash Benefits from Any Source: Yes

Type	Description	Monthly Amount	Restriction
<input checked="" type="checkbox"/>	Earned Income (i.e., employment income)	Part-time employment	\$800.00 Restrict to Organization
<input type="checkbox"/>	Unemployment Insurance		Restrict to Organization
<input type="checkbox"/>	Supplemental Security Income (SSI)		Restrict to Organization
<input type="checkbox"/>	Social Security Disability Income (SSDI)		Restrict to Organization
<input type="checkbox"/>	Veteran's Disability Payment		Restrict to Organization
<input type="checkbox"/>	Private Disability Insurance		Restrict to Organization
<input type="checkbox"/>	Worker's Compensation		Restrict to Organization
<input type="checkbox"/>	Temporary Assistance for Needy Families (TANF)		Restrict to Organization

Count/Total Monthly Income: 1 \$800.00

Definitions of Sources of Income

- **Earned Income** – Employment income
- **Private Disability Insurance** – Income received from private disability insurance
- **Unemployment Insurance** – Unemployment benefits from the State
- **Worker's Compensation** – Income for an individual who has been injured on the job
- **Pension From Former Job** – Income from a private employer or military retirement pay
- **Supplemental Security Income** – A federal program providing additional income for older and disabled individuals with little to no income stream
- **Social Security Disability Income** – A monthly compensation to individuals who can no longer work due to their medical conditions
- **Retirement (Social Security)** – Income payment provided by government for individuals who qualify
- **Alimony** – Income received for spousal/partner support
- **VA Service-Connected Disability** – A benefit paid to a veteran because of injuries or diseases that happened while on active duty or were made worse by active duty
- **VA NonService-Connected Disability** – To assist wartime veterans in need whose non-service-connected disabilities are permanent and total preventing them from following a substantially gainful occupation.

CLIENTTRACK USER MANUAL

Definitions of Sources of Income Continued

- **TANF** –Temporary Assistance for Needy Families
- **Child Support** – Income received from one parent to another to care for children
- **Other Income** – Any income not previously listed

The screenshot shows the ClientTrack application for a client named Vana White. The interface is divided into a sidebar on the left and a main content area. The sidebar contains navigation links such as 'Find Client', 'Intake', 'Crisis Call Workflow', and 'CASE MANAGEMENT'. The main content area is titled 'HUD Program Exit' and shows the 'Income and Sources, Non-Cash Benefits' section. It features a table with columns for 'Type', 'Description', 'Monthly Amount', and 'Restriction'. The table lists various income sources, including 'Temporary Assistance for Needy Families (TANF)', 'General Assistance', 'Retirement Income from Social Security', 'Veteran's Pension', 'Other Pension', 'Child Support', 'Alimony or other spousal support', and 'Other Income'. The 'Monthly Amount' column shows values like '\$800.00' and '\$220.00'. The 'Restriction' column has dropdown menus set to 'Restrict to Organization'. At the bottom right, a 'Save and Close' button is highlighted with a red box.

Definitions of Non-Cash Benefits

- **Food Stamps/Money for Food on Benefits Card** – Monthly payments issued by the government to persons with low income that can be redeemed for food at stores.
- **Special Supplemental Nutrition Program for Women, Infants and Children (WIC)** – A program geared toward supplying nutritional food for at risk pregnant women and their families.
- **TANF Child Care Services** – Child care funding assistance
- **TANF Transportation Services** – Transportation funding assistance
- **Other TANF Funded Services**
- **Section 8, Public Housing or Other Rental Assistance (PSH)** – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development.
- **Temporary Rental Assistance (RRH)** – ESG rental assistance
- **Other Source** – Any source not previously listed above.

CLIENTTRACK USER MANUAL

Adult Education Assessment at Exit

Complete the Adult Education Assessment. Remember that all fields with an **asterisk *** are required. The **“Default Client’s Last Assessment”** will populate information from the previous assessment completed and is helpful if the client’s information has not changed. Click **“Save”** when finished.

The screenshot shows the ClientTrack web application interface. On the left is a navigation menu with options like 'Find Client', 'Intake', 'Crisis Call Workflow', and 'CASE MANAGEMENT'. The main area displays the 'HUD Program Exit' section for client 'Vana White'. The 'Adult Education Assessment' form is active, showing fields for 'Assessment Date' (09/14/2015), 'Currently in School / Working on Degree' (No), 'Received Vocational Training/Apprenticeship' (No), 'Highest Grade Completed' (GED), and 'Attendance Status' (Obtained GED). A dropdown menu for 'Secondary Education' is open, showing options like 'None', 'Associates Degree', 'Bachelors', 'Masters', 'Doctorate', and 'Other graduate/professional degree'. The 'Restriction' section has radio buttons for 'Restrict to Organization' and 'Restrict to MOU/Info Release'.

Crimes Assessment

Complete the requested information, noting that all fields with an **asterisk *** are required data elements. You may also click **“Skip”** if the data is not collected or required.

The screenshot shows the ClientTrack web application interface. On the left is a navigation menu. The main area displays the 'HUD Program Exit' section for client 'Vana White'. The 'Domestic Violence Crime' form is active, showing fields for 'Incident Date' (09/06/2015), 'Abuser' (Doe, John), 'Offender Birth Date' (1/1/1978 12:00:00 AM), 'Relationship to Victim' (Intimate Partner), 'Crime' (Domestic Violence), 'VOCA Victimization Category' (D. Domestic Violence), 'Primary Victimization' (checked), 'Repeat Victim' (No), and a 'Comments' text area.

CLIENTTRACK USER MANUAL

Legal Assessment at Exit

Complete the requested information, noting that all fields with an **asterisk *** are required data elements. You may also click **“Skip”** if the data is not collected or required.

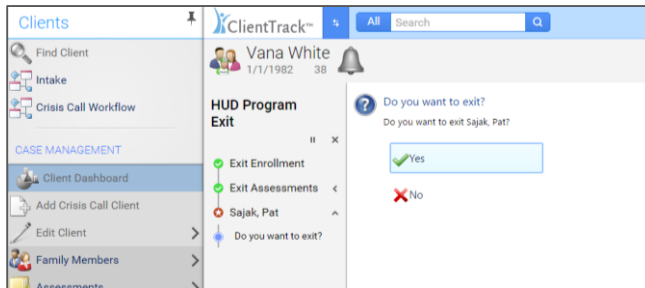
The screenshot shows the ClientTrack interface for a Legal Assessment. The left sidebar contains navigation options like 'Find Client', 'Intake', 'Crisis Call Workflow', and 'CASE MANAGEMENT'. The main content area is titled 'Legal Assessment' and includes fields for 'Date of Assessment' (09/14/2015), 'Assessment Description', and a list of legal situations with checkboxes. The 'Other Legal Questions' section includes a question about legal representation. The 'Legal Notes' section has a text area for additional information. The bottom right corner features 'Save' and 'Skip' buttons.

Transportation Assessment at Exit

The screenshot shows the ClientTrack interface for a Transportation Assessment. The left sidebar is the same as the previous screenshot. The main content area is titled 'Transportation Assessment' and includes fields for 'Assessment Date' (09/14/2015), 'Primary Transit Means' (Own Vehicle), and a section for vehicle details including 'Vehicle Ownership', 'Vehicle Make', 'Vehicle Model', 'Vehicle Year', 'Vehicle Description', 'Vehicle Condition', 'Registered State', 'License Plate Number', 'Insurance Company', and 'Insurance Renewal Date'. The 'Drivers License' section includes fields for 'License Number', 'License State', and 'License Expiration Date'. The bottom right corner features 'Save' and 'Skip' buttons.

Complete the requested information, noting that all fields with an **asterisk *** are required data elements. You may also click **“Skip”** if the data is not collected or required.

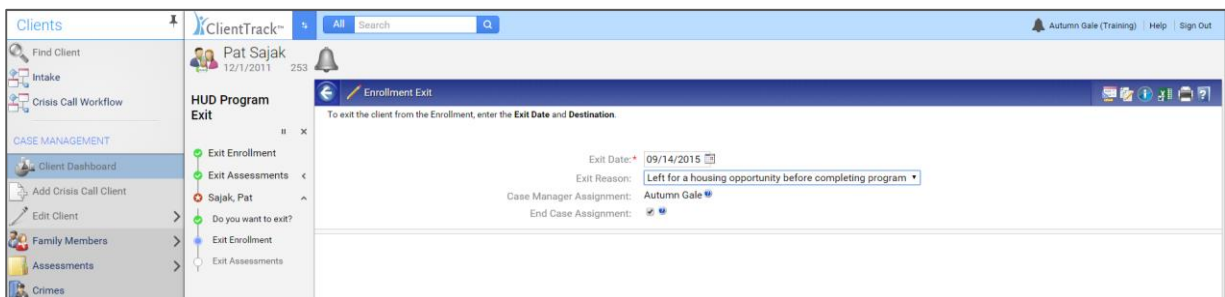
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Once you have completed the Transportation Assessment, you will be asked if you wish to exit all case members. Select **“Yes”** or **“No”** depending on whether all members are exited at the same time. You can exit one case member and leave other case members enrolled. If you select **“Yes,”** you will be prompted through the exit assessments for all case members.

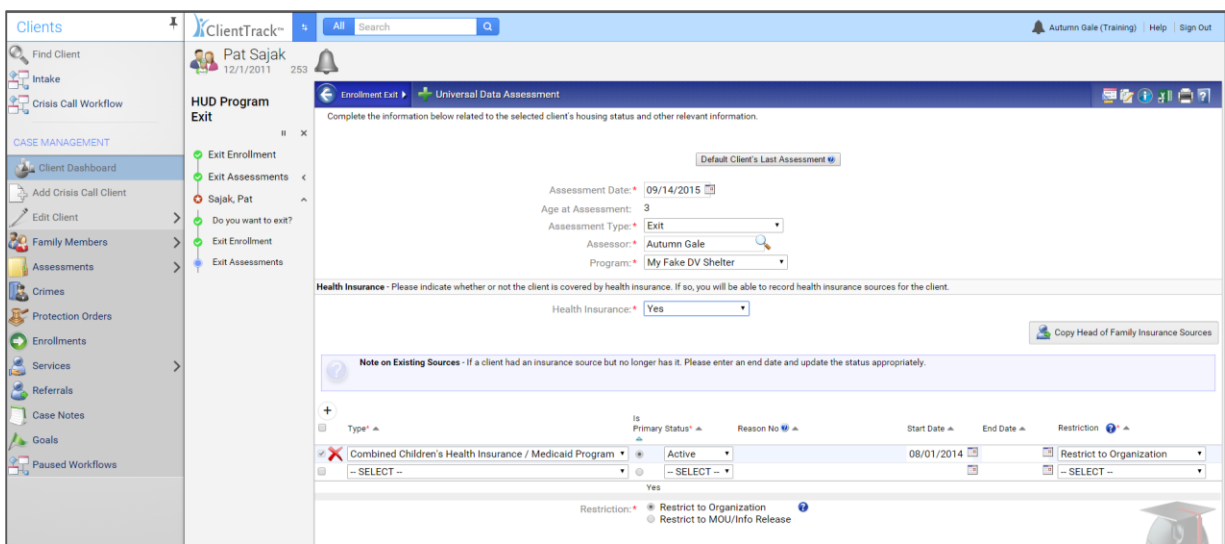
Exit for Child

After completing all of the exit assessments for the head of household, you will be prompted through the exit assessments for all enrolled household members. The adult exit assessments will look like the head of household’s assessments. The exit assessments will look differently for children.



Universal Data Assessment at Exit for Child

Complete the required information on the Universal Data Assessment at exit for the child and click **“Save”** to continue.



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Barriers Assessment at Exit for Child

Complete the Barriers Assessment for the child at exit. If **no barriers** are present at this time, select all barriers and leave the “**Barrier Present**” status as “**No**” and click “**Save & Close.**”

Barrier	Barrier Present?	Receiving Services / Treatment	Condition is Indefinite	Documentation of the disability and severity on file	Explanation	Previous Barrier Details
Alcohol Abuse	No					Previous Barrier
Chronic Health Condition	No					Previous Barrier
Developmental Disability	No					Previous Barrier
Drug Abuse	No					Previous Barrier
HIV/AIDS	No					Previous Barrier
Mental Health	No					Previous Barrier
Physical Disability	No					Previous Barrier

Child Education Assessment at Exit

Assessment Date: 09/14/2015

Highest Grade Completed: Nursery School to 4th Grade

Current Enrollment Status: Yes

Type of School: Public School

School Name: Preschool Prep

Connected with McKinney-Vento School Liaison? No

Comments:

Restriction: Restrict to Organization, Restrict to MOU/Info Release

Enter the “**Highest Grade Completed**” for the child, and then select if the child is “**Currently Enrolled in School.**” The built in logic may require additional information depending on how you answer the questions. Click “**Save**” when completed

Completing the Exit Workflow

When you have completed all exit assessment for all household members, you will be asked to finish the exit workflow. Click “**Finish**” to complete the discharge for your clients.

CLIENTTRACK USER MANUAL

You will then return to the client dashboard where you can see the project exit dates now as seen below. If you have also selected **“End Case Assignment”** on the exit workflow, you will see that your status has changed to **“Inactive”** on the client dashboard under **“Case Manager Assignments.”** If you forgot to click on the box beside **“End Case Assignment”** during the exit workflow, you can click on the little notepad beside your name under **“Case Manager Assignments”** to edit your status to **“Inactive”** to remove the discharged client from your case load.

Vana White's Dashboard

Vana White's Information

Name: White, Vana | Birth Date: 1/1/1982 | Age: 33
Gender: Female | Disabling Condition: No | Veteran: Yes
Ethnicity: Non-Hispanic/Latino | Race: White

Vana's Enrollments

Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
My Fake DV Shelter	2	09/07/2015	09/14/2015	My Sample Organization	09/14/2015	248	260
Transitional Housing	1	12/01/2014	08/09/2015	My Sample Organization	01/05/2015	29	236

Vana's Case Manager Assignments

Case Manager	Begin Date	Status	End Date	Enrollment
Autumn Gale	09/07/2015	Inactive	09/14/2015	My Fake DV Shelter
Autumn Gale	12/01/2014	Inactive	01/05/2015	Transitional Housing

Vana's Services

Date	Service	Units	\$ Total Organization
09/07/2015	Case Management	1.00	\$0.00 My Sample Organization
08/09/2015	Case Management	1.00	\$0.00 My Sample Organization

To Add a Provider To Your List of Providers

- Click on the blue box with the white arrows beside the ClientTrack logo at the top of the screen to toggle to the **“Providers”** screen.

- Conduct a search for the Provider in the database by clicking on the **“Find Provider”** link in the upper left-hand corner of the screen.

CLIENTTRACK USER MANUAL

Providers

Find Provider

Add New Provider

PROVIDER

Provider Information

Edit Provider

Referrals

Wait List

Contacts

Services

ClientTrack- ABC Legal

Find Provider

Locate a provider by using the selection criteria below. To get a list of all providers, leave the selection criteria blank and select search. To change your search, change the selection criteria and select search.

Provider: ABC Legal

Address:

City:

State:

Zip Code:

Provider Type: Provider

Search

No records found.

Provider Address City State Zip Code

- Click on the “**Add New Provider**” link if the Provider is not already in the system located below the “**Find Provider**” link in the upper left-hand corner of the screen.
- Complete the provider information. You must complete information that has an **asterisk *** before continuing.

Providers

Find Provider

Add New Provider

PROVIDER

Provider Information

Edit Provider

Referrals

Wait List

Contacts

Services

ClientTrack- ABC Legal

Provider Setup

PROVIDER SETUP

Enter a Provider Name, FEIN number and the street address where the provider is located. This information will be useful in contacting the provider and referring clients.

Provider Name: ABC Legal

Address: 123 Main St.

City, State Zip: Indianapolis, IN 46201

Phone: 317-317-3177

Website Address: www.abclegal.com

Account:

Accessing Organizations - The organizations listed below will be able to access this provider.

Accessing Organizations:

- All Organizations
- My Fake Organization
- My Sample Organization
- Safe Passage
- TES

Mailing Address - Enter a mailing address if it is different from the street address.

Mailing Address:

- Click “**Next**” in the bottom right-hand corner of the screen.
- Complete “**Referral Contact**” information.

Providers

Find Provider

Add New Provider

PROVIDER

Provider Information

Edit Provider

Referrals

Wait List

Contacts

Services

ClientTrack- ABC Legal

Provider Setup

PROVIDER SETUP - REFERRAL CONTACT

Identify the contact information for the Provider below. The contact information will be used to contact the provider when a referral is made.

Referral Contact: Thomas

Referral Contact Phone: 317-3177

Referral E-mail: tjefferson@abclegal.com

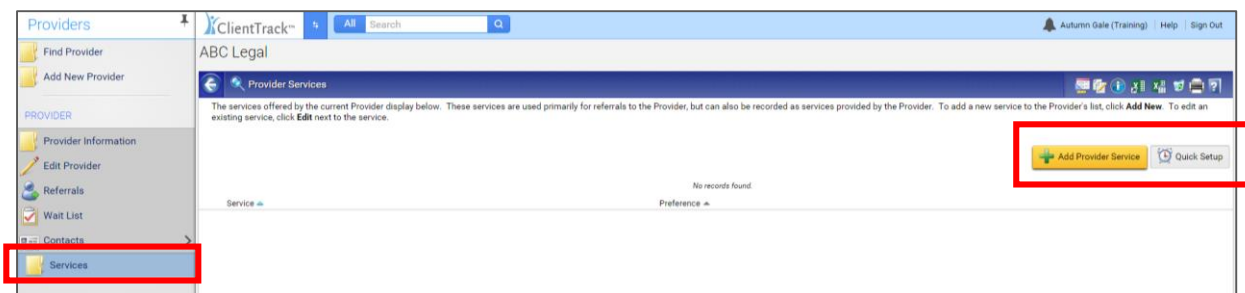
Telephone 2: 317-2345

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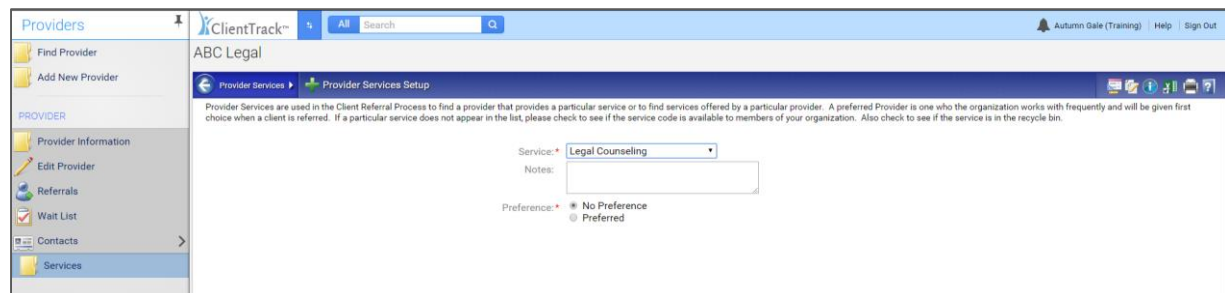
- Click on **"Finish"** to complete the addition of a Provider to your searchable list. You can go back to the previous screen if necessary by clicking on **"Previous."**

After adding the provider to the provider database through the above steps, ***you need to complete one more step before you can access the provider when setting up referrals and services.***

You must correlate a service with the provider and you can do this by remaining on the provider record and clicking on **"Services"** in the list of Menu Items found on the left-hand side of the screen. Click on **"Add Provider Service"** and select a service you want correlated with the provider. You can add as many services as you would like.



Once you have finished this final step, you will be able to select the provider when creating a referral or service.



Basic Reports

SERVICE SUMMARY REPORT

The Service Summary Report is a report of the services your agency has provided for clients enrolled in a specific project. You can run a Service Summary Report a variety of ways to extract specific service information from client records, for example services rendered in the Month of December or Case Management Services provided for the year, etc. Most often the Service Summary Report is used to submit for reimbursement.

To Run a Service Summary Report:

- Click on **"Reports"** found in the list of options in the bottom left-hand corner of your User Dashboard.
- Click on **"Service Reports"** found in the list of links on the left-hand side of the screen. A list of reports should drop down after clicking on the "Service Reports" link.
- Click on **"Service Summary Reports"** that immediately appears under "Service Reports" with a file folder beside it.
- Click on **"Service Summary"** that appears directly in the drop down beneath "Service Summary Reports" after clicking on it.
- Set up your report parameters by: *(Please note that all fields with an **asterisk *** are required fields)*
 - **Completing the date range** – There are a couple of options for setting the date range. You can select from the **"Predefined Date Range,"** though this may not provide you the exact dates you need. You can fill in the dates found below this labeled **"Between."** The first date box is the beginning date and the second date box is the ending date, for example, 01/01/2014 and 12/31/2014. This will give you all of the clients in your program for the entire year of 2014.
 - **Filtering by "Programs"** – Select the **"Program"** you want to run a Service Summary for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a program. You can run multiple programs on the same report. Simply select more than one **"Program"** by clicking on the name in the box. Again, you will see the green check mark to indicate you have selected it. To unselect one, simply click on it again and you will see the green check mark disappear.
 - **Selecting "Grants"** – Select the **"Grant"** you want to run the APR for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a grant. You can run multiple grants on the same report. However, your grant options will be dictated by the "Program(s)" you selected in the "Filter by Program(s)" box. If more than one grant appears, simply select more than one **"Grant"** by clicking on the name in the box. Again, you will see the green check mark to indicate you have selected it. To unselect one, simply click on it again and you will see the green check mark disappear.
 - **Filtering by User(s), Housing Status, Results by Age, State(s), Counties, Zip Code(s) and more** – Select a variety of parameters to extract more specific service data from clients your

CLIENTTRACK USER MANUAL

organization has served. Most of these selections will allow you to select more than one option in the box. Again, simply click on the option in the box and a green check mark will appear. To unselect an option, click on it again and you will see the green check mark disappear.

- Click on the **“Report”** button found in the bottom right-hand corner of the screen. This will begin running your report. You should see your report pop up in a new window within seconds. You can export your report to a pdf file for email transmission or record-keeping by clicking on the pdf icon in the upper right-hand corner of the report window.

ANNUAL PERFORMANCE REPORT (APR)

The APR is a comprehensive report of your program – who you served and how you served them. It is recommended that you run an APR often throughout the year to track missing data so that your report is complete when it is time for the annual submission. Here are quick steps to running the report and cleaning up missing data.

To Run an APR:

- Click on **“Reports”** found in the list of options in the bottom left-hand corner of your User Dashboard.
- Click on **“HMIS Reports”** found in the list of links on the left-hand side of the screen. A list of reports should drop down after clicking on the “HMIS Reports” link.
- Select **“APR for CoC Grant-Funded Programs”** in the list of reports that appear in the drop down.
- Set up your report parameters by: *(Please note that all fields with an **asterisk *** are required fields)*
 - **Completing the date range** – There are a couple of options for setting the date range. You can select from the **“Predefined Date Range,”** though this may not provide you the exact dates you need. You can fill in the dates found below this labeled **“Between.”** The first date box is the beginning date and the second date box is the ending date, for example, 01/01/2014 and 12/31/2014. This will give you all of the clients in your program for the entire year of 2014.
 - **Choosing the “Grant Program” and “Grant Program Component”** - Select the grant your program is under in the drop down for **“Grant Program.”** This will prompt the next selection in **“Grant Program Component.”** If you do not know this information, feel free to try several selections to find the correct options for your program. You won’t break it by choosing different options. If you do not see the correct set up information here, contact the HMIS Help Desk by emailing DVHelpDesk@ihcdaonline.com. Also note that **“Grant Program”** and **“Grant Program Component”** are not required fields, so you can run the report without making these selections, which is best done when running reports for several projects.
 - **Selecting “Grants”** – You may see several options to choose from after selecting **“Grant Program”** and **“Grant Program Component.”** Again, the aforementioned Grant Program and Grant Program Component will determine the options you see in this box. Select the **“Grant”** you want to run the APR for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a grant. You can run multiple grants on the same report. Simply select more than one **“Grant”** by clicking on the name in the box. Again,

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you will see the green check mark to indicate you have selected it. To unselect one, simply click on it again and you will see the green check mark disappear.

- **Clicking on “Project Type”** - Select a project type with the drop down list that appears. You may only select one “Project Type” at a time. Please note that Project Type and Program must be selected to populate the final measurement on Q.36 of the report. You can run your report without selecting “Project Type” and “Program,” but the measurement on the last page will not populate data.
- **Clicking on “Program(s)”** - Click on the name in the box and a green check mark will appear to show that you have successfully selected it. Multiple programs can be selected here as well like the “Grant” parameter.
- Click on the **“Report”** button found in the bottom right-hand corner of the screen. This will begin running your report. You should see your report pop up in a new window within seconds.

To Drill Down and Find Missing Data

After you run your report and it opens in the new window, you can click through it and see what sections of the report show “Missing” data. To find clients who are missing data, follow these steps:

- Click on the **blue link** for that section where you are missing data, for example “Q.7 Data Quality.”
*Please note that not all sections have a link to select. You may be able to find this missing data in another section of the report or you can contact the HMIS Help Desk for assistance.
- Another window will pop up with more detailed information for this section. You may be able to find your missing data in this screen, but it may be more helpful to **export it** to an Excel Spreadsheet to find the missing data in a more detailed, organized format.
- To export, click on the **Excel icon with the gold spindle** in the upper right-hand corner of the pop up window. You will be asked to “Open” or “Save” the spreadsheet, select “Open” to review the data. *Be sure to clear your downloads in your Internet browser after exporting client data.*
- You will see the word “**MISSING**” on the spreadsheet where clients are missing data. The columns are labeled at the top of the spreadsheet and client names are on the far left-hand side of the spreadsheet. You can then go to client records and complete the missing data.

To Complete or Edit Missing Data

In unusual cases, there may be a missing enrollment ID for an entry or exit of a client. You can complete the entry and/or exit assessments after an HMIS technician has set up the master assessment. If you need assistance with setting up the master assessment, contact the HMIS Help Desk at DVHelpDesk@ihcdaonline.com. Follow these steps to complete missing data on the assessments:

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- Go to the client's record who is missing the assessments.
- Click on the blue play button found on the client dashboard under "[Client Name] Enrollments" located centrally on the client's record.
- Select "Review Entry Assessments" or "Review Exit Assessments" (depending on which one you need to complete) in the drop down list.
- Complete the required entry or exit assessments by clicking on the little notepad beside each assessment.
- Save as you edit or complete assessments by scrolling down on the assessment screen and clicking on "Save."
- Blue check marks will appear after the assessment is completed.

Previous			
ESG - Albion Fellows DV Shelter	2	10/05/2013	10/05/2013
Edit Enrollment	1	09/16/2013	09/18/2013
View Case Members	2	08/27/2013	08/27/2013
Re Enter the Enrollment			
Case Summary Report			
Review Entry Assessments			
Review Exit Assessments			
Perform During Program Enrollment Assessment			
Exit the Enrollment			

Assessment	Finished
HMIS Universal Data	<input checked="" type="checkbox"/>
Legal	<input checked="" type="checkbox"/>
Transportation	<input checked="" type="checkbox"/>
Chronic Homelessness	<input checked="" type="checkbox"/>
HMIS Barriers	<input checked="" type="checkbox"/>
Domestic Violence	<input checked="" type="checkbox"/>
Financial	<input checked="" type="checkbox"/>
Employment (Adult Only)	<input checked="" type="checkbox"/>
Adult Education	<input checked="" type="checkbox"/>
Child Education	<input checked="" type="checkbox"/>
Health	<input checked="" type="checkbox"/>
Veteran Assessment (Adult Only)	<input checked="" type="checkbox"/>